

International Feed Industry Federation

Annual Report 2012/13



Vision

The International Feed Industry Federation's vision is to represent the global feed industry as an essential participant in the food chain that provides sustainable, safe and nutritious food.

Mission

Provide unified leadership to promote the global feed industry in order to contribute to the sustainable supply of safe and healthy feed and, therefore, food.

Goals

- 1) Hosting global forums, focusing on science-based solutions and information-sharing for the feed industry, such as the Global Feed & Food Congress (GFFC) and the International Feed Regulators Meeting (IFRM)
- 2) Interacting with governments, regulators and other international organisations and agencies, including the FAO, WTO, WHO, OIE and CODEX Alimentarius as a Codex recognised NGO, on crucial feed and food issues
- 3) Gathering and publishing global statistics and market trends on the feed industry
- 4) Promoting global equivalency through the adoption of the Codex Code of Practice on Good Animal Feeding
- 5) Supporting the establishment of national and regional feed industry associations
- 6) Promoting fair trade and the competitiveness of feed and livestock industries

Contents

- [Letter from the Chairman](#) 05
[Letter from the Executive Director](#) 06
[Representing the Global Feed Industry](#) 08

- [IFIF—One Voice](#)
[The Global Feed Industry](#)
[Welcome to New Members](#) 09

[Facilitating Dialogue](#) 10

- [IFIF FAO Collaboration](#)
[IFIF OIE Collaboration](#)
[Working with Partners across the Agri-Food Chain](#) 11
[6th International Feed Regulators Meeting \(IFRM\)](#)
[4th Global Feed & Food Congress \(GFFC\)](#) 12

[Measuring Environmental Performance](#) 14

- [The Specialty Feed Ingredients](#)
[Sustainability Project \(SFIS\)](#)
[UN FAO-led Partnership on Livestock Environmental Assessment and Performance \(LEAP\)](#)
[FAO Global Agenda of Action in Support of Sustainable Livestock Development](#) 15

[Developing International Feed Standards](#) 16

- [Working with CODEX Alimentarius](#)
[IFIF “Comparison of Approval Process and Risk-Assessment procedure for Feed Ingredients”](#) 16

[National & Regional Updates](#) 18

- [Structure & Membership](#) 43
[IFIF Directors 2012-2013](#) 44
[IFIF Expert Committees 2012-2013](#) 45
[Definitions & Terms](#) 48



Photography by Laurent Bellec©



»Looking ahead, demand for livestock products will continue to intensify over the decades to come. Estimates show that between 2010 to 2050 animal protein production is expected to grow by around 1.7% per year, with meat production projected to rise by nearly 58%, aquaculture by 90% and dairy by 55%. In meeting these future demands, I believe sustainability and animal welfare are not optional, and I know this reflects many consumers concerns and wishes. At the same time, we have to be open towards innovation and technology, which will be the basis of producing more and better food over the next 40 years«

Mario Sergio Cutait
Chairman, IFIF

International Feed Industry Federation

Letter from the Chairman



Dear Members,

In 2013 compound feed production will likely reach close to 1 billion tonnes worldwide. This numerical milestone is a marker, not only for the achievements of our industry, but also for the opportunities as well as for the challenges we all face in the future. Given the anticipated growth of the world's population to around 9 billion people by 2050, and the associated higher demand for animal proteins, it is vital that our industry, as well as the wider agricultural chain, can meet this challenge in a sustainable and safe way.

I am pleased to report that IFIF has been fully engaged in meeting these challenges and providing a unified leadership role for our industry in order to contribute to the sustainable supply of safe, healthy feed and, therefore, food. As you will see over the next few pages, we are working on a number of strategic projects, which will positively impact the image, the environmental footprint, the international regulatory framework and the efficiency of our sector.

Since taking over the Chairmanship from Dave Cielesak two years ago, I am proud that IFIF has continued to grow ever stronger. Our Federation has experienced solid growth in new projects and deeper relationships with international stakeholders while attracting a range of new members from across the globe, including the Middle East, and I want to again welcome these great organisations to the IFIF family! The forward momentum of 2012,

the 25th anniversary year of our organisation's existence, continued into 2013, and I am sure that 2014 will be an even more exciting year for IFIF.

In April 2013, we organised our most successful Global Feed & Food Congress (GFFC) yet, alongside the 6th International Feed Regulators Meeting (IFRM), with record attendance at both events. I want to thank the GFFC organising committee and AFMA, our proud host in South Africa, for organising such an excellent Congress.

At the GFFC we launched the Southern African Feed Manufacturers' Association (SAFMA) together with the FAO and I believe this is an important step for Africa to come together on critical feed and food issues.

Our relationship with the FAO continues to strengthen with IFIF's participation in the Global Agenda of Action and as an official stakeholder in their Industry Livestock Partnership (MUL). We have also agreed to work with the FAO Statistics Division on collecting, analysing and validating global feed statistics, a project I am very excited about.

Our cooperation agreement with the World Organisation for Animal Health (OIE) further strengthens our relationships with regulators at the international level and this will link us even closer to our partners along the feed and food chain.

We have achieved all this while keeping in mind our sustainability aims – produce more, using less, at

an affordable cost to the consumer, and championing science-based decisions, the need for continued innovation and better technologies, as well as regulatory convergence and free and fair trade as key elements to meet future challenges.

All of these initiatives and successes would not be possible without our members' expert engagement in our Policy, Education and Technology Committees (PET), as well as the support of the IFIF Board of Directors and the IFIF Executive Committee. I want to thank all of you for your involvement and your efforts.

Driving our accomplishments is our Executive Director, Alexandra de Athayde, and I want to thank her and her team for all her continued great work and dedication to IFIF.

It has been an honour and a pleasure to serve as your Chairman over the last two years and lead the organisation in such exciting times. I know that together we will be able to meet future challenges and continue to advance our industry for the benefit of consumers worldwide.

Yours sincerely

Mario Sergio Cutait,
Chairman IFIF

International Feed Industry Federation

Letter from the Executive Director



Dear Members,

The last two years IFIF has grown even stronger and I am pleased to report that in 2012 and 2013 our Federation initiated and participated in a number of important activities, while strengthening our relationship with key stakeholders across the chain, and solidifying IFIF's position as the voice for our industry globally.

We strengthened our engagement with the whole feed & food chain as well as with international regulators. IFIF believes we cannot tackle the future challenges alone and we have built even closer links with government regulators and other partners in the agri-chain to aim at common efforts and messages. Our 5th and 6th International Feed Regulators Meetings (IFRM) attracted a record number of regulators, and our 4th Global Feed & Food Congress in April 2013 in Sun City, South Africa, positioned IFIF even more prominently among government regulators, and linked us more closely with other partners in the agricultural chain, not least from the African continent.

We also worked on a number of fronts to measure, benchmark and improve the sustainability of the feed & food chain. For example, together with FEFANA we launched the Specialty Feed Ingredients Sustainability (SFIS) project to measure and establish the positive role of specialty feed ingredients to reduce the environmental impact of livestock production. IFIF also joined the FAO Partnership on Livestock Environmental Assessment and Performance (LEAP), together with AFIA and

FEFAC, and we are part of the Guiding Group of the Global Agenda of Action in Support of Sustainable Livestock Development (GAA).

Last but not least, we continued to be strongly engaged in the development of international feed standards, while at the same time working with government regulators on a convergence of regulatory processes.

I am very pleased that after three years of dedicated work, on 2 July 2013 IFIF joined global regulators at the 36th Session of the Codex Alimentarius Commission meeting in Rome where the Codex Ad Hoc Intergovernmental Task Force on Animal Feeding (TF AF) terms of reference documents were successfully adopted. IFIF also completed the second phase report of the "Comparison of Approval Process and Risk-Assessment procedure for Feed Ingredients", which now covers seven regions, including Brazil, Canada, China, Europe, Japan, South Africa and USA.

This 2012-2013 IFIF Annual Report highlights the work we have undertaken and details our accomplishments and how we have managed to positively impact our industry by working together and through our PET Committees – Policy, Education and Technology. I want to thank our dedicated Committee Chairs Joel Newman (Policy), De Wet Boshoff (Education), and Alexander Döring (Technology), as well as all the members of our PET Committees for their support and expertise, which underpin IFIF's accomplishments.

This report also includes updates from our national and regional association members and I want to thank all

of them for their contributions. Finally this report provides an accounting of our organisation structure, our membership, as well as our Board of Directors and Executive Committee. I want to thank our Chairman, Mario Sergio Cutait, for his leadership and our entire Board of Directors for their support of IFIF's mission and work.

2014 promises to be an important and exciting year for our Federation. The 7th annual IFRM in Atlanta in January will kick off our engagement with regulators and the chain. We will also be engaged in the FAO IFIF Statistics Project, an important effort that should lead us to not only compile credible global feed statistics but also position IFIF as the reference point for such data. Finally, we will aim to further expand the IFIF membership, with a particular focus on the Asia-Pacific region as well as the Middle East, while already laying the groundwork for our 5th GFFC.

I look forward to working with all of you to drive forward IFIF in the next years to ensure we can provide a unified leadership role for our industry in order to contribute to the sustainable supply of safe, healthy feed and, therefore, food of animal origin.

Thank you all for your continued support.

Sincerely,

Alexandra de Athayde
Executive Director, IFIF

»Consumer trust and confidence in the safety of the whole food supply chain is vital and I am proud that IFIF provides a unified leadership role for our industry in order to contribute to the sustainable supply of safe, healthy feed and therefore food of animal origin. IFIF believes that only by working together with all stakeholders can we continue to ensure feed and food safety, while meeting the global demands for food for 9 billion people by 2050 and to do so sustainably.«

Alexandra de Athayde
Executive Director,
IFIF



Representing the Global Feed Industry

IFIF – ONE VOICE

The International Feed Industry Federation represents the global feed industry as an essential participant in the food chain that provides sustainable, safe and nutritious food. IFIF is made up of national and regional feed associations, feed related organisations, and corporate members from around the globe. Overall, IFIF members represent over 80% of the global animal feed industry.

IFIF provides a unified leadership and coordinating role to promote the global feed industry in order to contribute to the sustainable supply of safe, healthy feed and therefore food. Given the anticipated growth of the world's population to around 9 billion people by 2050, and the associated higher demand for animal proteins like beef, poultry and fish, it is vital that we can meet this challenge in a sustainable and safe way.

IFIF completed a successful 2012, the 25th anniversary year of the Federation's existence, with solid growth in new projects and stronger relationships with international stakeholders while welcoming a range of newmembers to IFIF.

2013 was an equally exciting and strong year for IFIF, with the successful organisation of the 4th Global Feed & Food Congress (GFFC), which was held for the first time on the African continent.

There are three main strands to IFIF's work, which are laid out in more detail in the following pages. One of IFIF's key aims is to facilitate dialogue with the whole feed & food chain and international regulators. In addition, IFIF works with its members to measure and improve the environmental performance of the livestock production chain. Finally, IFIF is active at an international level on both the development of feed standards and working on a convergence of regulatory processes.

THE GLOBAL FEED INDUSTRY

Livestock raising and the consumption of animal products make a crucial contribution to the economic and nutritional wellbeing of millions of people around the world. Animal feeds play a leading role in the global food industry and feed is the largest and most important component to ensuring safe, abundant and affordable animal proteins.

The last years have continued to see an increase in the demand for animal protein worldwide, including for livestock, dairy and fish. Generally IFIF has observed a growth of production particularly in the developing world, with the developed world remaining more or less stable.

However, 2012 was also a challenging year, with the US and Brazil feed production slightly lower than in 2011 (USA -1,5%, Brazil -3%), and the EU 27 having stable production. China experienced approximately 5% growth 2012.

In 2013 the world compound feed production is fast approaching an estimated one billion tonnes annually. Global commercial feed manufacturing generates an estimated annual turnover of over US \$370 billion.

The global feed industry continues to expand in volume and value in response to increases in world population, urbanisation and growing consumer purchasing power. Commercial production or sale of manufactured feed products takes place in more

than 130 countries and directly employs more than a quarter of a million skilled workers, technicians, managers and professionals.

One of the challenges is that on top of the almost 1 billion tonnes of feed produced by the feed industry, around 300 million tonnes of feed is produced directly by on-farm mixing. This poses challenges as food safety authorities do not regularly audit mixing by farmers and regulatory authorities only inspect when there is a problem. IFIF believes it is vital for the feed industry and for the sustainability of the whole feed and food chain that clear standards apply throughout the whole feed chain, and both industrial and on farm mixers should be controlled and inspected on a regular basis.

WELCOME TO NEW MEMBERS

IFIF is very pleased to welcome those new members to the IFIF family who joined the Federation in 2012 and 2013. They are all key players in their field and IFIF is extremely pleased to have them on board contributing their time and expertise.

We would like to welcome the [Israeli Feedmill Association \(IFA\)](#), which joined IFIF as a national association member and which extends the reach of IFIF members into the Middle East.

We also would like to welcome our newest corporate members to IFIF, including [BASF SE](#), [Dupont Pioneer](#), [Evonik Industries AG](#), [M.Cassab](#), [Merck / MSD Animal Health](#), the [Monsanto Company](#) and [Phibro](#)

Animal Health Corporation. These companies are critical players in the feed production chain and we are very pleased to be able to draw on their expertise and support as members.

We also extend a warm welcome to the important feed-related organisations that joined us in the last two years, including the [Brazilian Association of Vegetable Oil Industries \(ABIOVE\)](#), as well as [FAMI-QS](#) and [GMP+ International](#), two feed quality assurance schemes.

Thank you to all members for their strong support of IFIF's work, projects and mission to ensure the feed industry continues to be seen as an essential participant in the food chain that provides sustainable, safe and nutritious food.



Photography by Laurent Bellec©

Facilitating Dialogue

One of IFIF's main aims is to facilitate meaningful dialogue around the issues of policy, education and technology as to how our industry participates in the production of a safe, nutritious, sustainable and affordable global food supply. IFIF believes that only by working together with all stakeholders, including international organisations, such as the Food and Agriculture Organisation of the United Nations (FAO) and the World Organisation for Animal Health (OIE), as well as partners along the feed and food chain, can we continue to ensure feed and food safety, while meeting the demands of 60% more food for 9 billion people by 2050 – and to do so sustainably.

IFIF FAO COLLABORATION

IFIF has a strong collaborative relationship with the FAO dating back many years, and in April 2005 the FAO and IFIF, recognising their common interest in promoting the safe supply of animal feed throughout the world, signed a formal Memorandum of Understanding (MOU) which continues to be the basis of collaboration between the two organisations.



Mario Sergio Cutait, IFIF's Chairman, and Daniela Battaglia, Livestock Development Officer at the Animal Production and Health Division of the FAO engage with delegates at the 6th IFRM.

IFIF and the FAO Animal Production and Health Division continue to organise the very successful annual International Feed Regulatory Meeting (IFRM), and the FAO provided critical technical support for the organisation of the 4th Global Feed & Food Congress, which was held in Sun City, South Africa, in April 2013.

IFIF's relationship with the FAO continues to strengthen with IFIF's participation in the FAO Global Agenda and as an official stakeholder in the Industry FAO Livestock Partnership (MUL) and the FAO's Private Sector Initiative. IFIF will continue to be strongly engaged in these efforts.

In addition, as global compound feed production continues to expand, especially in the developing world, IFIF and the FAO Statistics Division have agreed to collaborate on collecting, analysing and validating global feed statistics. IFIF and its members are excited about this collaboration and our joint effort should result in a harmonisation of global feed statistics.

IFIF OIE COLLABORATION

In October 2012, IFIF signed a Cooperation Agreement with the World Organisation for Animal Health (OIE), based in Paris, France. This agreement aims to facilitate and strengthen cooperation between the two organisations, in particular with the regards to the prevention and management of infectious diseases, including zoonotic disease, as well as the support for the development, updating and implementation of OIE standards and guidelines. The cooperation further aims to strengthen links between feed safety and food safety.



IFIF is excited about this important cooperation and looks forward to work closely with the OIE to contribute to improved animal health and productivity, which in the end leads to a positive contribution to public health.



"FAO is committed to facilitating dialogue between regulators and private sector, and continues to provide extensive information and capacity development on different issues regarding animal nutrition and animal feeding. The feed sector can valuably contribute to make the livestock and food sectors more responsible and sustainable and to achieve other important goals such as public health, and animal health and welfare. The IFRM is an important opportunity to exchange ideas among stakeholders from around the world, and to coordinate our efforts towards these common goals."

Daniela Battaglia, Livestock Development Officer at the Animal Production and Health Division of the FAO

6TH INTERNATIONAL FEED REGULATORS MEETING (IFRM)

The annual International Feed Regulators Meeting (IFRM) organized by IFIF in cooperation with the FAO provides an opportunity for regulators and feed industry professionals from across the globe to exchange their thoughts and discuss concrete ideas for providing safe feed and food in a sustainable manner around the world. The 6th International Feed Regulators Meeting (IFRM) meeting was held on 9 April 2013 in Sun City, South Africa, prior to the 4th Global Feed and Food Congress.

The 6th IFRM brought together a record number of international feed regulators and government officials with representatives from IFIF and the FAO, and proved an important opportunity for global industry and feed regulators to discuss key issues for the feed and food chain, such as the harmonisation of global feed safety standards and opportunities for mutual recognition of approval processes.

IFIF was particularly excited that the IFRM was held in Africa for the first time and that so many colleagues from the African continent were able to join this meeting and provide an overview of the African regulators and industry issues and priorities.



Alexandra de Athayde, IFIF's Executive Director, welcomes delegates to the 6th IFRM in Sun City, South Africa.

Other topics of discussion at the 6th IFRM included an update on the ad hoc Intergovernmental Codex Task Force on Animal Feeding (TF AF), and the presentation of the IFIF 'Comparison of Approval Process and Risk-Assessment procedure for Feed Ingredients'.



4TH GLOBAL FEED & FOOD CONGRESS (GFFC)

The Global Feed and Food Congress (GFFC) was launched in 2005 by IFIF in cooperation with the FAO to provide a global platform for scientists, industry, governments, civil society and intergovernmental organisations to come together to discuss critical issues of food and feed safety, technology and sustainability. The tri-annual Congress has established itself as the leading global event of its kind.

The 4th Global Feed and Food Congress organised by IFIF with technical support by the FAO, and hosted by the Animal Feed



Prof Hlengiwe Buhle Mkhize, Deputy Minister of Economic Development of the Republic of South Africa

"Agriculture remains one of the most reliable drivers of the economy. The 4th GFFC affords us the opportunity to review the key legislative, trade and practical aspects of a sector that plays a key role in food safety and security. We can use this as an opportunity to learn from each other and recognise the importance of technology transfer and partnerships, which are key to increase global feed and food production and food security worldwide."

Prof Hlengiwe Buhle Mkhize, Deputy Minister of Economic Development of the Republic of South Africa

Manufacturers Association of South Africa (AFMA) was held in Sun City, South Africa, from 10-12 April 2013. Mario Sergio Cutait, IFIF Chairman and Loutjie Dunn, Chairman of the Animal Feed Manufacturers' Association of South Africa (AFMA), were joined by the honorable Prof Hlengiwe Buhle Mkhize, Deputy Minister of Economic Development of the Republic of South Africa, Dr. Berhe G. Tekola, Director of the Animal Production and Health Division at the FAO and Dr. Hinner Koster, AFMA Board Member, to open the Congress and

welcome 700 international delegates from 44 countries representing the global feed and food chain.

The theme for the 4th GFFC 'Safe Feed & Food for All' linked to the global challenge to feed 9 billion people by 2050 and to do so sustainably. This theme reflects the aspiration of the whole feed & food value chain and IFIF's view on sustainability matches this aspiration: 'produce more, using less, at an affordable cost to the consumer.'

From left to right: Dr Hinner Köster, AFMA Board Member; Dr Berhe G. Tekola, FAO Director of Animal Production & Health Division; Mr Loutjie Dunn, AFMA Chairman; Mr Mario Sergio Cutait, IFIF Chairman; Prof Hlengiwe Buhle Mkhize, Deputy Minister of Economic Development of the Republic of South Africa; Mr De Wet Boshoff, AFMA Executive Director; Ms Alexandra de Athayde, IFIF Executive Director and Mr Andrew Makenete, Executive Director of Calico Capital.



The 4th GFFC attracted exceptional speakers who provided their insights and expertise in over 80 world-class presentations. Delegates discussed critical issues covering the whole feed manufacturing and food processing value chain, with a special focus on Feed and Food Safety, Food Security, Technology, and Sustainability. The final congress programme and speaker presentations are available at www.gffc2013.com.

From left: Mr. Joel Newman, President & CEO of AFIA and Chair of the IFIF Policy Committee; Dr. Eva Reinhard, Codex TF AF Chairman and Assistant Director General of the Swiss Federal Office for Agriculture.

Launch of Southern African Feed Manufacturers' Association (SAFMA)

The Southern African Feed Manufacturers' Association (SAFMA) was officially launched following an agreement at the 4th Global Feed & Food Congress in Sun City, South Africa, under the auspices of representatives from IFIF and the FAO.

SAFMA brings together representatives from South Africa, Zimbabwe, Botswana, Mozambique, Namibia, Zambia and Mauritius as part of a regional feed manufacturers association that will have as their vision the harmonisation of the feed industry in the region in order to further 'safe feed for safe food'. IFIF supports this initiative to strengthen the global feed industry and to start the process to provide Africa with one voice.

SAFMA as a regional feed manufacturers' body can play a role in the harmonisation of legislation and regulations in the region in order to enhance effective trade between

member countries as well as creating a self-regulating regional industry with the same vision, namely safe feed for safe food. SAFMA will also be able to support the feed industry and regulators through



From left to right: Ms Alexandra de Athayde, IFIF Executive Director; Ms Daniella Battaglia, Livestock Development Officer, FAO Animal Production and Health Division; Mr Mario Sergio Cutait, IFIF Chairman; Dr Berhe G. Tekola, FAO Director of Animal Production & Health Division; Mr Loutjie Dunn, AFMA Chairman and Mr De Wet Boshoff, AFMA Executive Director.

Measuring Environmental Performance

Another major aim for IFIF is working with its members to meet the sustainability challenge – produce more, using less, at an affordable cost, and in order to support this IFIF is currently undertaking three key projects.

THE SPECIALTY FEED INGREDIENTS SUSTAINABILITY PROJECT (SFIS)

The Specialty Feed Ingredients Sustainability Project (SFIS) was launched by IFIF in 2012 together with the EU Association of Specialty Feed Ingredients and their Mixtures (FEFANA) in order to improve the environmental performance of livestock production through specialty feed ingredients. This global consortium, which includes a number of IFIF's associations and corporate members, is an exciting collaboration, which should have a direct positive impact on the future environmental footprint of the feed & food chain.

This project is intended to establish the positive role of the use of Specialty Feed Ingredients (SFIs) on the environmental impact of livestock production. Due to their functionality, SFIs are recognised to have not only improvement potential of animal performance, but also to reduce the environmental impact of animal production.

The assessment is being conducted on a global basis and through collaborative work between different regions. The use of SFIs in animal nutrition provides benefits to the environmental impact of animal production, by, for example, reducing the excretion of certain nutrients (nitrogen, phosphorus), improving the performance of the animals, reducing the feed consumption or allowing the use of locally based or unusual feed materials. Thus, the environmental impact can be mitigated by adopting feeding measures in which

Meeting the demands of 60% more food for an estimated 9 billion people by 2050 sustainably is one of the central challenges we face. IFIF believes that only by working together with all partners in the feed & food chain, including governments, the private sector and non-governmental groups, can we meet this challenge.

IFIF is working with its members and partners on a number of fronts to measure, benchmark and improve the sustainability of the feed & food chain.

the use of SFIs plays a key role. For example, by reducing the crude protein level in compound feed by only 1% when supplementing amino acids, the nitrogen excretion by the animal will be lowered by 10 % in the manure as a result. First results were presented at the 4th Global Feed & Food Congress in April 2013 and the final study will be presented in 2014.

UN FAO-LED PARTNERSHIP ON LIVESTOCK ENVIRONMENTAL ASSESSMENT AND PERFORMANCE (LEAP)

Livestock raising and the consumption of animal products make a crucial contribution to the economic and nutritional wellbeing of millions of people around the world – particularly in developing countries. Yet the need to improve environmental performance of the livestock sector will continue as the FAO estimates that demand for livestock products will continue to intensify over the decades to

come. Meat consumption is projected to rise nearly 73 percent by 2050; dairy consumption will grow 58 percent over current levels.

IFIF, together with the American Feed Industry Association (AFIA) and the European Compound Feed Manufacturers' Federation (FEFAC), have joined the UN FAO-led Partnership on Livestock Environmental Assessment and Performance (LEAP). The overarching goal of this initiative is to contribute to improved environmental performance of the livestock sector while considering social and economic viability. The partnership will contribute towards the achievement of this goal through support to decision-making by providing guidance on environmental assessments and their subsequent application. Research benefits of this partnership could lead to changed diet patterns and composition for farm animals and fish reducing further GHG emissions attributed to livestock production.

The feed industry will work with the FAO and other governmental, private sector, and non-governmental partners on a number of fronts to strengthen the science of environmental benchmarking of livestock supply chains. Activities planned for the initial three-year phase of the project include:

- » Establishing science-based methods and guidelines on how to quantify livestock's carbon footprint, covering various types of livestock operations and rearing systems.
- » Creating a database of greenhouse gas emission factors generated for the production of different kinds of animal feed – feed production and use offer significant opportunities for reducing livestock emissions.
- » Developing a methodology for measuring other important environmental pressures, such as water consumption and nutrient losses.
- » Initiating a communications campaign to promote use of the partnership's methodologies and findings.

Within the framework of LEAP, FEFAC and AFIA set up a consortium in 2011 with the view to collaborate on environmental footprinting. The consortium expects to reach a first milestone at the end of 2013 with the publication of the first version of the Feed LCA Guidelines. IFIF supports the development of these guidelines as currently there are many different methods being used to measure and assess the environmental impacts of animal raising, making it difficult to compare results and set priorities for the continuous improvement of environmental performance along supply chains.

FAO GLOBAL AGENDA OF ACTION IN SUPPORT OF SUSTAINABLE LIVESTOCK DEVELOPMENT

IFIF is a Member of the Guiding Group of the Global Agenda of Action in Support of Sustainable Livestock Development (GAA). IFIF has signed the Global Agenda Consensus and actively inputs in the work of the Agenda, and has supported the development of the initiative since its start in 2010.

The Agenda is a partnership of livestock sector stakeholders supported by the FAO and committed to the sustainable development of the sector. Together the partners develop and implement an ambitious agenda to ensure that sector growth contributes to socially desirable objectives. The partnership brings together public and private sector, producers, research and academia, civil society, NGOs, and inter-governmental organisations to focus on three areas of work:

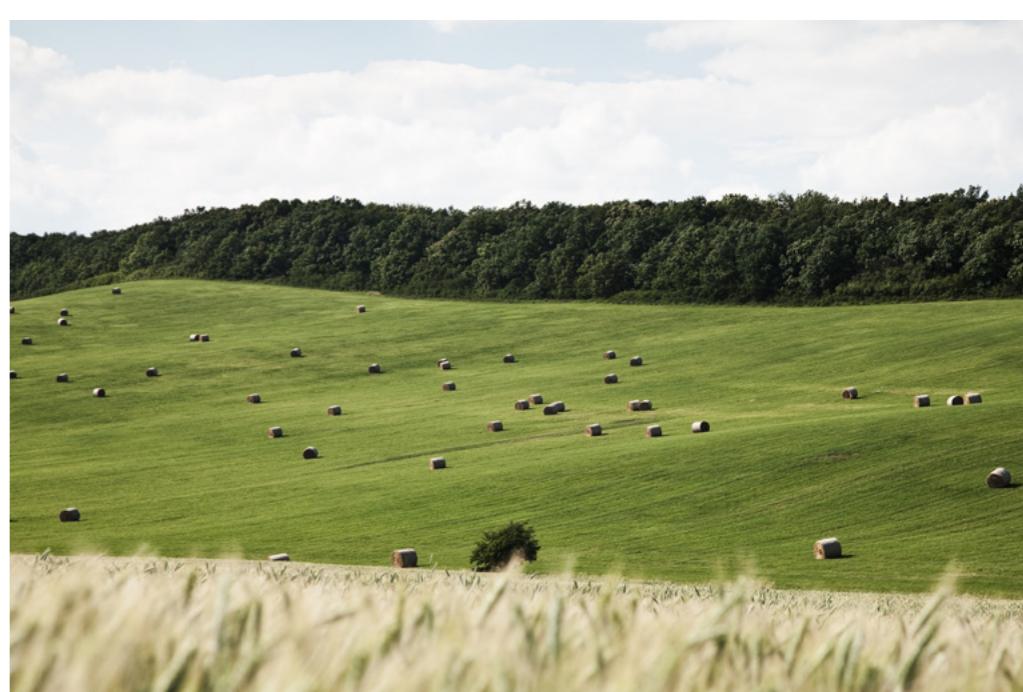
- » **Closing the Efficiency Gap:** This aims to stimulate the application of existing but not widely used technologies by the bulk of the world's producers whose use of natural resources is often greatly

inefficient. Agenda partners will develop public-private and other forms of partnership to transfer and adapt resource use efficient technologies.

» **Restoring Value to Grassland:** This pursues a better management of grazing land, which can contribute to carbon sequestration, protection of water and biodiversity but also enhanced productivity and livelihoods. Agenda partners will explore and promote the financial and institutional innovations required for the delivery of grassland-related ecosystem services.

» **Waste to Worth:** This aims at recovering and recycling nutrients and energy contained in animal manure, particularly from intensive and confined livestock production operations. Agenda partners will develop planning tools and regulatory and incentive frameworks to support viable manure management and create opportunities for recycling.

You can discover further details about the Global Agenda of Action by visiting www.livestockdialogue.org



Developing International Feed Standards

IFIF helps to ensure high standards of health and welfare for animals and people, by collaborating with international regulatory bodies to help set stringent and effective international regulatory standards for the whole feed chain to ensure safe feed and, therefore, food of animal origin. Participating in Codex and FAO meetings, IFIF has been able to input on the development and harmonisation of international codes, standards and practices that impact feed manufacturers worldwide.

WORKING WITH CODEX ALIMENTARIUS

IFIF is a Codex Alimentarius recognised NGO and has been actively involved in the development of the Codex Code of Practice of Good Animal Feeding and over the last three years has been a member of the ad hoc Codex Intergovernmental Task Force on Animal Feeding (TF AF).

At the 33rd Session of the Codex Alimentarius Commission, held in July 2010 in Geneva, it was agreed to establish an ad hoc Codex Intergovernmental Task Force on Animal Feeding (TF AF) to develop general principles and guidelines for the assessment of risks for feed ingredients, and to propose a list of prioritised hazards for further evaluation.

The 6th Session of the TF AF in February 2012 aimed to establish guidelines to apply the risk assessment methodologies of the Codex Alimentarius for animal feed and feed additives, to be used as international standards. It also aimed to develop a prioritised list of hazards in feed ingredients and feed additives.

IFIF has strongly supported the efforts to develop these documents and an IFIF delegation under the leadership of Joel G. Newman, President and CEO of the American Feed Industry Association and Alexandra de Athayde, IFIF

Executive Director, has participated in the Task Force on Animal Feeding meetings and consultations and has contributed to the drafting of these terms of reference documents over the last years.

At the 7th Session of the Codex TF AF which took place in Bern, Switzerland, on 4-8 February 2013 the TF AF, under the leadership of Dr. Eva Reinhard, TF AF Chairman and Assistant director general of the Swiss Federal Office for Agriculture, completed their draft work on both terms of reference documents will set the future standards for the feed industry globally and are intended for governmental use.

» 'Guidelines on Application of Risk Assessment for Feed' which include specific science-based risk assessment criteria to apply to feed contaminants and to enable countries to prioritize and assess risks based upon local conditions, use and the impact on human health.

» 'Guidance for Use by Governments in Prioritizing the National Feed Hazards' in feed ingredients and feed additives for governmental use by using clear criteria to prioritise the list of hazards and take account of the potential transfer of contaminants in feed to edible animal products.

On 2 July 2013 IFIF joined global regulators at the 36th Session of the Codex Alimentarius Commission meeting in Rome where the Codex Ad Hoc Intergovernmental Task Force on Animal Feeding terms of reference documents were successfully adopted.

IFIF / FAO FEED MANUAL

In order to support the spreading of good manufacturing practice and higher feed safety standards around the globe, IFIF published the Feed Manual together with the FAO. The publication of this

manual is meant to increase safety and feed quality at the production level, both for industrial production and on-farm mixing, with a particular focus on the developing world.

This manual provides updated, comprehensive information and practical guidelines to assist producers and all stakeholders along the production and distribution chain to comply with the regulatory framework, which have or will come into force in response to the Codex Alimentarius Code of Practice on Good Animal Feeding. The application of this Code is an important step for the expansion of international trade in feed products as well as in products of animal origin. Both food exporting and importing countries can benefit from a more level playing field to support the trade of safe food products. This publication is intended to guide managers of feedmills and the feed industry as a whole.

It is also of value to officers engaged in feed inspection, with their supervisory roles in feed safety. This manual is targeted at the commercial feed industries and farm-based feed mixers in developing countries and emerging economies in their endeavour to meet the rising quality and safety requirements of both the export and domestic markets, with the increasing participation of large-scale retailers everywhere.

In addition to the English language versions, in 2012-2013 FAO and IFIF published the Chinese and Arabic language versions of the Feed Manual. The Feed Manual has two other languages in production for publication: French and Spanish.

The Feed Manual has been distributed to regulators and industry globally and IFIF believes it is a very relevant document to help support better standards, particularly in developing economies.

The production and publication of the Feed Manual was made possible by a grant from the Standards and Trade Development Facility (STDF), a global partnership that supports developing countries in building their capacity to implement international sanitary and phytosanitary (SPS) standards, guidelines and recommendations as a means to improve their human, animal and plant health status and ability to gain or maintain access to markets.

IFIF COMPARISON OF APPROVAL PROCESS AND RISK-ASSESSMENT PROCEDURE FOR FEED INGREDIENTS

In July 2013 IFIF launched the "Comparison of Regulatory Management of Authorized Ingredients, Approval Processes, and Risk-Assessment Procedures for Feed Ingredients" report that covers Brazil, Canada, China, European Union, Japan, South Africa, and United States. This study was drafted based on expert input and support from government feed regulators and feed ingredients associations in the seven regions covered.

The objective of the report is to address similarities and differences among seven regulatory jurisdictions on the regulatory management of authorized (existing) feed ingredients, the approval process, and risk management assessment for feed ingredients. The study can assist in global marketing as well as supporting in the harmonization/convergence efforts in identifying areas of dissimilarity, which ultimately should ease trade of feed and ingredients among these regions.

This report is the second phase of the initial 2011 IFIF study launched at the 4th International Feed Regulators Meeting (IFRM) in 2011, on the "Comparison of Approval Process and Risk-Assessment procedure for Feed Ingredients", which examined similarities and differences between the legislative systems in the EU, the USA and Canada.

At the 5th IFRM in Atlanta on 23-24 January 2012, based on interest by global feed regulators and industry representatives, IFIF decided to undertake this second phase which updates the risk assessment procedure

and approval process for feed additives in the US, EU and Canada, and expands the scope to other world regions, including Brazil, Japan, China and South Africa.

The updated comparison report (available for download at www.ifif.org) is organised such that a number of the regulatory attributes of interest for the feed ingredients (new and existing) are compared in a series of tables in a side-by-side comparison for each jurisdiction. A summary table of the nuances of this information on sentinel examples of ingredients is provided. In addition, a description of the specific data requirements for two example feed ingredients, an inorganic mineral source and a pelleting aid, is provided.



Photography by Laurent Bellec©

National & Regional Updates



AFIA

American Feed Industry Association

USA

SUMMARY OF AFIA'S KEY ACTIVITIES IN THE PAST YEAR

The American Feed Industry Association (AFIA), based outside Washington, DC, is the recognized leader on international feed industry issues and developments. Members include more than 550 domestic and international companies and state, regional and national associations. Member companies are livestock feed and pet food manufacturers, integrators, pharmaceutical companies, ingredient suppliers, equipment manufacturers and companies which supply other products, services and supplies to feed manufacturers. The feed industry makes a major contribution to food safety, nutrition and the environment, and plays a critical role in the economical production of healthy, wholesome meat, milk, fish and eggs. More than 75% of the commercial feed in the US is manufactured by AFIA members. AFIA is particularly proud of the Safe Feed/Safe Food (SF/SF) Certification Program, an independent, third-party certified program that promotes accountability and leadership at feed facilities. To date, the SF/SF program has more than 400 certified feed mills and feed-ingredient facilities operated by 160 companies in the US and Canada. A similar program, the International Safe Feed/Safe Food (I-SF/SF) Certification Program, launched in 2010 as a result of an alliance AFIA formed with FEFANA, the Feed Additives and Premixtures Association of the European Union. FEFANA is the developer of the Feed Additives and Premixtures Quality Systems, or FAMI-QS, program. I-SF/SF is designed to help facilities' trade with

European customers by illustrating compliance with the EU's Feed Hygiene Regulation (183/2005). There are 25 facilities from 17 companies with certification, seven of which are international facilities. Several other companies are undergoing the process. In early 2012, AFIA launched a third certification program specifically designed for the pet food industry, the Pet Food Manufacturing Facility Certification Program. This program builds upon the foundation of the SF/SF program, but addresses the unique needs of the pet food manufacturing industry. To date, there are nine certified facilities with numerous others in the process of seeking certification. AFIA's staff strives to provide members with the highest level of service and advocacy on a range of complex issues. While much of AFIA's focus is on the federal government, which includes the US House of Representatives and the US Senate, the US Department of Agriculture, the US Food and Drug Administration (FDA) and the Environmental Protection Agency, the association also works with agencies and legislatures in individual states. AFIA tackled a variety of concerns on behalf of its members in 2012. Commodity-market regulation, *Salmonella*, the Food Safety Modernization Act, the ingredient approval process and the use of animal-health products in livestock and poultry are only a few of the issues AFIA addressed. Outreach to FDA officials on a number of issues is a matter of consistent engagement for AFIA. AFIA has continued to provide feedback on the upcoming *Salmonella* Compliance Policy Guide, use of antibiotics in feed as well as issues surrounding ingredient approvals.

Ensuring food safety will always remain a priority for the AFIA, especially as a member of the Codex ad hoc Intergovernmental Task Force on Animal Feeding. The Task Force is charged with developing science-based guidelines for governments or the "Application of Risk Assessment for Feed and Prioritizing Feed Hazards." The standards would be accepted internationally, creating a more uniform process for risk assessment between countries which should ultimately minimize international trade restrictions or unnecessary requirements. AFIA has been involved since the Task Force was established by the Codex Alimentarius Commission in 2010. In 2012, AFIA expanded the staff to include a position focused solely on international trade. AFIA has been very active in representing the industry with input on the negotiation of Free Trade Agreements and opening doors for our industry to gain needed assistance with the development of new global trade markets. The US trade offices are much more aware of the feed industry and the opportunities for global feed trade. This is an exciting area that will provide growth opportunities for expansion of the US feed and feed ingredient industries. As part of the AFIA Sustainability Initiative, AFIA has partnered with our feed and feed additive counterpart associations in the EU to provide FAO and other parties with accurate information on the contributions of the feed industry. Many have read the Food and Agriculture Organization of the United Nations (FAO) life cycle assessment (LCA) report titled Livestock's Long Shadow, which used very inaccurate information and labeled the feed and livestock industry as villains in their contributions to

damaging the environment. It is for this reason that AFIA is working to provide accurate data for future evaluations of the feed and livestock industries. The results of this collaboration will provide accurate LCA information on feed ingredients and additives; and it will also highlight how new products, technologies and practices are reducing potential effects on the environment.

A PREVIEW OF AFIA'S KEY ISSUES IN 2013

Regulatory and legislative issues, both domestic and international, will continue to be of utmost importance for the association in the coming year. Below is a list of selected issues:

Food Safety Modernization Act (FSMA)

Two years after this massive piece of legislation was signed into law, the FDA has released the food rules, and the feed rules are expected soon. Of particular concern is the FDA's view that the rules should be HACCP-based (hazard analysis and critical control points) – despite not mentioning HACCP by name. FSMA does use many of the HACCP principles and describes "critical control points". AFIA's main concern with mandatory HACCP rules is that the same results can be achieved with other programs, such as with the Safe Feed/Safe Food Certification Program (www.safefeedsafefood.org) without the formality or costs of a formal HACCP program. However, AFIA sponsors HACCP training for firms wishing to utilize that system and in response to demand.

The centerpiece of this new food

**US Feed Production by species group
(in millions of tons)**

	2010	2011	2012
Total	160.00	161.00	165.00
Starter/Grower	21.17	22.53	23.09
Layer/Breeder			
Broiler	54.78	55.83	57.22
Turkey	10.33	6.38	6.54
Dairy	18.28	19.04	19.51
Beef/Sheep	21.84	22.84	23.41
Hog	22.35	23.02	23.59
Other	11.25	11.37	11.65

Source: AFIA

Feed Control Officials (AAFCO) and FDA have worked in tandem with strong AFIA support to review, approve and list these ingredient definitions in AAFCO's annual *Official Publication* (OP). Most state feed laws reference this publication as the official list of approved ingredients. However, the FDA Amendments Act of 2007 used the term 'ingredient standards', which FDA announced would greatly alter from previous rules. It has resulted in a threat to the AAFCO/FDA system of review. At AFIA's strong urging, FDA and AAFCO recently renewed their memorandum of understanding to allow the current process to continue until 2015. In the interim, AFIA is negotiating with the U.S. Congress and FDA to place the AAFCO OP into federal law, so that FDA will recognize those feed ingredients listed therein. There have been mutual concessions on all sides and AFIA is hopeful this will be achieved this year.

GRAS Notifications

FDA's Center for Veterinary Medicine (CVM) authorized a pilot program to accept generally recognized as safe notices a few years ago. The system, pioneered by the food side of FDA, worked well at Center for Food Safety and Applied Nutrition (CFSAN) for many years and some 400 ingredients have been accepted for use in food, including some in baby food. However, CVM has yet to authorize one true feed ingredient, as there is a significant difference in what CVM accepts and CFSAN accepts as 'efficacy', or the ability to produce a desired or intended result.

Continued overleaf

Probably of more importance is the lack of FDA support for placing these "accepted" ingredients in the AAFCO OP, which is mandatory under most state laws. As of press time, FDA is not supportive of these type of ingredients being listed under the "definitions" section, but would agree to listing them in a "GRAS Notices" section in the AAFCO OP. It remains to be seen if that would be acceptable to all the states. If it is, then AFIA will pursue the objections regarding "efficacy" requirements.

Salmonella in Feed

For many decades, FDA had a single policy that all salmonellae are adulterants in food and feed. In 2010, FDA proposed to change the approach and retain the same policy for food and pet food, but list only those salmonellae that are harmful to animals that might appear in feed in a guidance document.

FDA has been made aware that AFIA supports this scientifically-valid approach. In July, 2013 FDA released the final *Salmonella* compliance policy guide for feed that lists the eight serotypes for five types of feed (cattle, swine, horses, sheep, and poultry). This is a sensible public policy decision, and one that takes a clear scientific approach accepted by international bodies.

Veterinary Feed Directive and Antibiotic Resistance

According to FDA, the agency has concluded that antibiotics useful in human medicine cannot be judiciously used for growth promotion, feed efficiency or milk production claims in animals. Drug sponsors must change these claims by submitting data for prevention-type therapeutic claims. Moreover, FDA believes such uses should be under the control

of a veterinarian via the Veterinary Feed Directive (VFD), an AFIA-led initiative enacted into the Animal Drug Availability Act of 1996.

AFIA believes that the VFD rules have had some administrative problems in need of repair. In 2012, FDA published a draft proposed rule to amend the VFD rules and make significant changes, such as removal of the amount of VFD that needed to be manufactured and removing the veterinarian's license number and state of license, among other changes. AFIA agreed with all the changes, but various issues remain and AFIA will continue to work on these issues in 2013.

For more information please visit: www.afia.org



ANAC Animal Nutrition Association of Canada

Canadian Feed Industry Statistics (in mill. tonnes)

Total feed production (commercial and on-farm)	30.5
Commercial feed production	20.5
Est'd 400-500 feed mills	
On-farm feed production	10.0
Est'd 25,000 sites	

Source: ANAC

Complete feed production by species (in mill. tonnes)

	2010
Total	30.5
Swine	11.0
Beef	8.8
Dairy	5.5
Poultry	4.3
Other	0.9

Source: ANAC

The Animal Nutrition Association of Canada (ANAC) is the national trade association for Canada's animal feed industry. ANAC's 170 member companies manufacture livestock, poultry and fish feed and supply grains, oilseed meals, micro-ingredients and other commodities and services to the industry. ANAC member companies account for approximately 90% of commercial feed production in Canada. The key role for ANAC is to advocate on behalf of the feed industry with government regulators and policy makers. The association's objective is to foster a favourable business environment for its members while maintaining the highest standards of feed and food safety. The feed industry is an important part of Canada's agri-food economy and a critical partner in the country's food safety system. The estimated total commercial production of feed in Canada is 20 million tonnes and in addition, an estimated 10 million tonnes is produced on-farm.

A SUCCESSFUL YEAR FOR ANAC IN 2012

This is an exciting and challenging time for ANAC and its members. After thirty years, the federal feeds regulations are being revamped and ANAC will remain at the forefront of this effort. We will continue to advocate a regulation that best serves our industry through a focus on safety, consumer protection and competitiveness. On a parallel track, CFIA's inspection program is also being modernized. Again, the focus is on development of an outcome-based system concentrating on risk mitigation. While initial efforts are directed at the food sector, ANAC is participating in the consultative process, as there will be significant crossover between the inspection systems for food and feed. We are also managing a number of other important issues, including proposed restrictions on grains imported from the United States,

the emergence of veterinary drug regulations that will impact the feed industry, and enhancement of ANAC's FeedAssure program through inclusion of an ISO 22000 module.

MOVING CLOSER TO MODERNIZED FEEDS REGULATIONS

Throughout 2012, ANAC's efforts to bring about reform of the feed industry's regulatory environment gained traction. This was the result of a broad-based outreach program with agri-food stakeholders and government to win support for the industry's position following the publication of our comprehensive policy paper, *The Case for Modernization of the Canadian Feeds Regulations*. Also key to the progress we are now seeing is the CFIA president's 2011 announcement of an agency-wide review of all regulatory frameworks. This placed the feeds regulations near the top of the priority list, slated for modernization within three years.

Since that time, ANAC, CFIA and livestock producer organizations have opened a dialogue aimed at crafting new outcome-based regulations for the feed industry. Formal government-industry discussions took shape in 2012, beginning with a multi-stakeholder workshop structured to identify the key issues to be addressed in the regulatory renewal process.

From the outset, it was evident that the feed industry as well as a broad cross-section of agri-food stakeholders and consumer groups shared a common objective: all recognized the need to bring about a new regulatory system that meets CFIA's strategic outcomes, while at the same time fostering a commercial environment focused on safety, consumer protection and industry competitiveness. Moreover, there was broad agreement among industry participants that a new Canadian regulation should consider, and where appropriate incorporate, international best practices.

In recognition of its leadership role as the prime advocate for regulatory change, ANAC was asked to participate in a newly-formed steering group charged with guiding the development of a new feeds regulatory framework. This group has been in operation since November 2012 and will continue to spearhead the development of the regulatory model through to completion. The regulatory renewal effort will proceed on two tracks. First is the development of criteria for the classification and authorization of feed ingredients, and in this context ANAC and its technical advisors prepared and submitted to CFIA a detailed proposal for streamlined regulatory treatment. The second track is the establishment of regulatory oversight mechanisms for manufacturing processes, including the identification and control of hazards. In this connection, it is our intention to ensure that ANAC's HACCP program, FeedAssure, plays a key role in a modernized compliance and enforcement system. It has long been our position that FeedAssure certification should enable regulators to refocus their efforts where they are most needed, on establishments without adequate feed safety systems in place. While the timetable for completion of a modernized feeds regulation is fluid, the aim is to complete the regulatory framework – the policy outline for the overall content of the regulation – before the end of 2013. This will be followed by further stakeholder consultation and refinement of the approach, leading to publication of the proposed regulation in Canada Gazette for public review and comment sometime in 2014.

ANAC's objective throughout this process is to remain at the forefront of a move toward outcome-based regulations that focus on risk, and that dismantle barriers to innovation and feed industry productivity.

For more information please visit: www.anacan.org

AFMA

Animal Feed Manufacturers Association

South Africa

GENERAL MARKET CONDITIONS

After facing the challenges the global economic meltdown brought about during 2008/09, AFMA feed production again showed signs of growth towards recovery as private spending started to increase due to more disposable income as a result of economic growth. Global commodity prices however, showed sudden increases in 2011 (specifically Corn and Soya), which reached new record highs in mid 2012 due to extreme drought experienced in both North and South America, leading to food price increases also experienced globally. This situation however, didn't have such a severe influence on feed production as was originally anticipated and production maintained a 4% growth into 2012. Poultry feed covers the largest segment of the total market with a 40% share, followed by Beef and Sheep (28%), and Dairy (18%).

ASSOCIATION ACTIVITIES INTERNATIONAL

Hosting the 4th GFFC 2013 and 6th IFRM

AFMA had the great honour of hosting the 6th IFRM and the 4th GFFC during 9-12 April 2013 at Sun City – South Africa, the first time ever on the African continent. Judged by the record number of delegates attending (724) this can be regarded as the most successful GFFC in its history of existence. The 6th IFRM was as good attended with 91 regulators attending from different countries, the highest number attending an IFRM meeting, which is normally hosted in January in Atlanta, USA.

Establishment of a regional feed association SAFMA

As outcome and goal of the larger GFFC 2013, a regional Feed Association, the Southern African Feed Manufacturers Association was founded under the leadership of AFMA. The aim is to establish a feed association in each SADC – member state to work towards the harmonizing of legislation, regulations and general accepted manufacturing practises in the region. The IFIF/FAO – Feed Manual will be used along other internationally accepted practises to facilitate skills and knowledge transfer in the different member countries. The first step taken to lay a sound foundation for this project was to compile a comprehensive network and database of facilities in the different member states as well as contact details.

ASSOCIATION ACTIVITIES LOCAL

Regulatory Matters

Finalisation of Fertilizers and Feeds Bill

The main focus of the association and more so its Technical Committee was the finalisation of the Fertilizers and Feeds Bill to be in-time to enter the Parliamentary Legislative Process. As mentioned in the previous IFIF-Annual report, AFMA played a pivotal role in the drafting of this concept legislation and the liaison process between members and Government. This piece of draft legislation was tabled to Parliament in late 2012, for legal preparation and discussion by the Parliamentary Portfolio Committee on Agriculture, Forestry and Fisheries in early 2013.

AFMA represented the formal industry and its members in a debate and presentation session at the

Parliamentary Portfolio Committee on Agriculture, Forestry and Fisheries during March 2013, during which all angles of the draft legislation was investigated and AFMA and other members of the Feed fraternity were given the opportunity to raise concerns as well as legal arguments for and against the Bill. Following this process the draft legislation was referred back to the National Department of Agriculture for wider consultation and amendments to the draft Bill. It is however not expected that the Bill will be tabled during 2013, but rather during the 2014 Parliament process.

Self Regulation

Expansion of the AFMA Code of Conduct

As reported in the IFIF Annual Report 2011, the AFMA Code of Conduct was implemented and remains a living document to keep-up with the constant changes of a dynamic feed industry and the latest legislation impacting on it. The Code of Conduct will however now be expanded to include adherence to National Competition legislation and National Consumer Protection legislation. By keeping the Code of Conduct a living document, it also requires the external auditing process to keep-up with the pace of revision and change, thus the third party auditing appointee should constantly be reviewing its process, making sure it adheres to the needed auditing standard of the Code of Conduct.

Roll-out of Transport Protocol to all members

An audit profile and checklist has been completed and implemented by the third party auditing institution contracted by AFMA. Transport contractors of feed raw materials will be audited according to requirements laid down by AFMA and its members. This will therefore yet again give AFMA members another risk management tool in the feed manufacturing process.

Early Warning Systems (Salmonella, Mycotoxins, Dioxins)

AFMA is currently running databases for Salmonella and Mycotoxins in cooperation with different feed and ingredient labs. These databases are run specifically as an early warning system to members and to the industry. Should a potential risk occur it will be reported and linked to the Early Warning System (EWS) Protocol drafted by the AFMA Technical Committee, based on the European Early Warning System. AFMA and Government are in discussions on Dioxin testing and potentially forming a Public Private Partnership taking this initiative forward.

Training and Skills development

AFMA in conjunction with the Agricultural Sector Education Training Authority (AGRISETA) has during 2012 completed the curriculum for the occupation – Feed Miller, which will have National accreditation and will be accepted by all feed mills in South Africa. The curriculum was designed in a two tier format, both a theoretical and practical part. The format features different pre-set levels and requirements to be achieved before being promoted to the next level. After all levels has been achieved successfully and it has been proven that the student has the sufficient

theoretical and practical knowledge, the qualification will be awarded by AFMA and the AGRISETA. AFMA and the AGRISETA are in the process of developing the custom make learning material to support the above mentioned developed curriculum. AFMA will be consulting and making use of material which already exists internationally and if need be, will have certain learning material drafted by experts in the particular discipline.

Information and Skills Transfer

AFMA has once again, as the yearly normal practice played a major role in transferring skills, knowledge and information to its members and the industry by hosting training sessions, various workshops and the Annual AFMA Symposium, which is one of the highlights on the Feed Calendar. Annual Symposia are dedicated to the most relevant technical feed issues or issues impacting on the feed industry which requires national discussion and debating in an open forum. The 2012 Symposium was hosted on 3rd of October and the Symposium 2013 is planned for 2 October.

Establishing of an SACOTA Secretariat

During the end of 2011 AFMA has formally established a full-time secretariat for the South African Cereal and Oilseed Trade Association (SACOTA). SACOTA is the most prominent association of trading members operating within South Africa and the SADC region. Its vision is to be a significant, influential and respected force in the Southern African grain and agricultural sector by expanding its activities and pro-actively raising awareness amongst key role-players including governments, traders, financial institutions, producers, processors, millers and NGOs. SACOTA is playing a major role

South African National Feed Sales (Tonnes)

Feed Type	2011	2012
Total	10,655,028	11,086,124
Dairy	1,880,000	1,974,000
Beef & Sheep	3,038,000	3,156,482
Pigs	810,746	8,512,83
Layers	1,130,755	1,182,770
Broilers	3,194,130	3,295,120
Dogs	297,000	3,088,80
Horses	121,047	1,307,31
Ostriches	180,450	1,840,59
Aquaculture	2,900	2,800

Source:AFMA

both locally and in future in the region on laying down trade related policy, legislation and regulations as a support to the Grain and Oilseed value chains and its partners. By applying the synergies that AFMA and SACOTA have to offer, AFMA foresee to have a much broader approach, base and impact in the larger Agriculture with a specific focus on the Grain and Oilseed Value Chains, to the benefit of its members.

For more information please visit: www.afma.co.za

CLFMA Compound Livestock Feeds Manufacturers Association of India

CLFMA was formed in 1967 with the objective of helping the promotion of overall animal husbandry, including promotion of concept of balanced feeding of animals in accordance with their nutritional requirements for deriving from them maximum output through productivity improvement. It was broad based to include members from all sectors of livestock production during 2002. Members of CLFMA from feed sector have a total installed capacity of over 10 mmt / annum of feed production. CLFMA has membership of manufacturers and suppliers of feed additives, raw materials, packaging materials, feed plant and machinery, Laboratory equipments, breeders, integrators, meat processors and exporters, dairy processors and others connected with the Indian Livestock Industry.

CLFMA OBJECTIVES:

- » To represent the Livestock Industry in various policy making forums related to Livestock Sector in India.
- » To provide information and education to the members and farming communities with a view to upgrade standards and performance levels of Livestock Sector to the potential.
- » To interface with scientific / other communities both within and outside the country to facilitate application of new scientific developments in the Industry.
- » To provide a forum for interaction within the Industry to learn and implement best practices amongst its members.

Thus the broad objective has been to facilitate / enhance the contributions of the input providers and output processors to the development of Livestock Sector.

CLFMA ACTIVITIES:

- » The feed manufacturers among members have set up modern and efficient feed mills, with facilities for analytical testing of feed raw materials and finished feeds for providing quality assurance.
- » CLFMA has evolved standard specifications for compound feed for Cattle, Poultry and Pigs and also for the purchase of feed raw materials, which should help in providing quality assurance to farmers.
- » CLFMA organizes / conducts National Symposia, Seminars and Orientation Courses at veterinary colleges, Farmer Workshops and other Educational programmes.
- » Encourages applied research - "CLFMA AWARDS" for the best research work in India.
- » CLFMA collects, classifies and circulates Technical, Managerial and Statistical information, besides information on government policies – On line, latest news and information on our website.
- » Makes representations to Central and State Governments and submits suggestions, thus providing a strong platform to voice of the industry before the Central and State Government.
- » CLFMA sponsors research / surveys and studies, which are necessary and helpful for the growth of Livestock Industry.

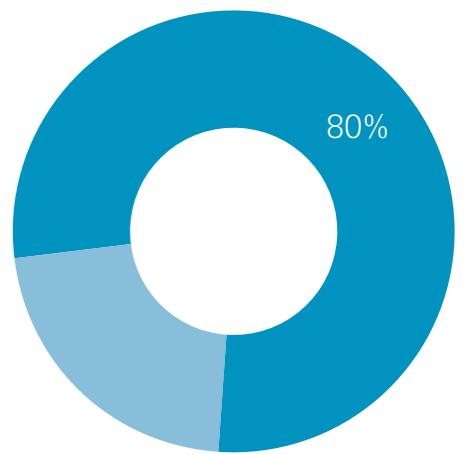
Animal Feed Production Data 2012

Broiler Feeds	11.9 MMT
Layer Feeds	8.5 MMT
Dairy Feeds	7 MMT
Fish Feeds	645,000 MT
Shrimp Feeds	300,000 MT
Petfoods	25,000 MT

IFA Israeli Feedmill Association Israel

FEED PRODUCTION AS A PERCENTAGE OF GLOBAL OUTPUT

IFA represents approximately 75% - 80% of the commercial Israel feed industry



Animal Production 2012

2012	
Total	3.1 million tonnes
Broilers	500,000 tonnes
Layers	8 million layers
Eggs	2.0 billion
Turkeys	92,000
Milk	1.1 billion liters
Swine	18,000 tonnes
Aquaculture	15,000 tonnes

Source IFA

KEY MARKET DEVELOPMENTS

The Israeli feed industry is unique since all raw materials used in feed formulation are imported from all over the world. There must be a steady reliable supply that must be evaluated, stored and utilized efficiently. This is the basis for much of IFA's activities. The Israeli feed industry manufactures broilers, layers, turkeys breeders, dairy cattle, beef cattle, swine and aquaculture.

THE ISRAELI FEEDMILL ASSOCIATION

The Israeli Feedmill Association (IFA) represents approximately 75% - 80% of the commercial Israeli feed industry. IFA partners include 6 feedmills located throughout the country. IFA plays an active role in the Israeli feed industry. Its major objectives include education, regulation, emergency situations.

EDUCATION

Involvement in providing nutritional knowhow within the industry by:

- » Encouraging international relations
- » Setting up joint trials in IFA experimental facilities
- » Providing its workers with feed milling training courses. Local and invited speakers discuss current industry issues. Hands on training courses are organized on an annual basis.

REGULATIONS

IFA advocates on behalf of the industry with government regulators and policy makers. In joint cooperation with government policy regulators IFA is working to update an archaic system. Together the goal is to provide reliable mechanisms for assuring feed and food safety. An additional up and coming issue is the Clean Air Legislation at discharging at ports. IFA is motivated to work jointly with regulators to provide appropriate legislations.

EMERGENCY PROTOCOLS

Raw material for the feed industry is imported and therefore adequate supplies must be maintained at all times. IFA plays an important role in establishing an emergency protocol for a grain shortage situation. The aim of IFA is to provide healthy affordable food to the Israeli market.

INDUSTRY OUTLOOK

During 2012 feed industry showed a somewhat positive growth albeit several branches suffered from the depressed economic circumstances. Unfortunately, this seems likely to be the situation within the 2013 fiscal year.

For more information please visit: www.ifif.org

Feedlatina

Latin American and Caribbean Feed Industry Association

Latin America



Latin America and the Caribbean are the future of food production in the world and uniting and harmonizing economic bloc countries and ensuring the competitiveness, quality and food safety, meeting the demands of consumers for safe food in the domestic, regional and international markets. Animal feed is a fundamental pillar for sustaining the continuity of the production of animal protein and by extension food. Latin America and the Caribbean are responsible for 17% of global production.

FEEDLATINA has among its aims to be the agent of information, preparation, performance and credibility of the productive sector with all public and private actors at all levels, strengthen the image of the block next to the main consumers, and developing countries join forces today have little representation within that market.

FEEDLATINA

The Association of Animal Feed Industries in Latin America and Caribbean aspires to be the agent of information, preparation, performance and credibility of the productive sector in relation to all public and private actors at all levels.

At a more mature among those interested in Latin American union in April 2007 at a meeting with 40 people from industry and government of different countries during the Second Global Feed & Food Congress in San Paulo, Brazil, was born Feed Industries Association of Latin America and Caribbean, FEEDLATINA.

PROGRAMS AND SERVICES

Our goals:

- » Promote education
- » Develop a network of joint scientific and professional
- » Establish communication channels, including the Latin American Forum for Regulators via web
- » Equalize technical and regulatory demands
- » To promote fair trade between regions and economic blocs
- » Strengthen the region and their representation with international organizations

Task:

- » Create a data-base and mailing-list technical committees and general
- » Formally communicated to the authorities of the countries and industry associations at national, regional and global
- » Produce and promote information material
- » Map and the census of Latin America and Caribbean: population, GDP, production, etc.
- » Lift, support, create patterns, projects, events, generate financial and basis for interaction with the private and public international environment meeting the goals and mission of Feedlatina

ISSUES IN LATIN AMERICA

- » Large area
- » Many countries
- » Different cultures
- » Under development countries
- » Several authorities
- » Different legislations
- » A lot of bureaucracy
- » Special requirements
- » Grey zone (no agreement)
- » Barriers

CHALLENGES TO ENSURE SAFETY AND COMPETITIVENESS

- » Flexibility, agility and production "tailor made"
- » Ensure access to new products and technologies
- » Reduce fees and taxes
- » Improve the logistics structure and the regulatory environment
- » Discuss scientifically:
 - » technical and sanitary barriers
 - » commercial barriers
 - » restrictions for additives, antibiotics, animal proteins and other topics
- » To get an harmonization of the different documents / to recognize the registers approved in one country by all countries for comex;
- » Decrease the bureaucracy, like: legalization, unnecessary documents, etc.

For more information please visit:
www.feedlatina.org

feedlatina/stdf project feed&food safety latin america approved by the stdf/wto, march 2013

FEED AND FOOD SAFETY PROGRAM LATIN AMERICA - A project for regulatory harmonization and feed safety in Latin America and the Caribbean (STDF/PG/345) - A FEEDLATINA Project, who will take the lead on project implementation with support from FAO Regional Office for Latin America and the Caribbean (FAORLC), the OIE regional representation for the Americas and IICA - Inter-American Institute for Cooperation on Agriculture, working together with the Feed Agencies from the pilot countries AR, BR, CH, CO, CR, CU, MX, PE, PY, UY, invited countries and FEEDLATINA Members.

The project is likely to contribute to increased intra and inter-regional trade in feed products and the regional integration.

The Standards and Trade Development Facility (STDF) is a global partnership that supports developing countries in building their capacity to implement international sanitary and phytosanitary (SPS) standards, guidelines and recommendations as a means to improve their human, animal and plant health status and ability to gain or maintain access to markets. 3 years

Budget: US\$2,432,390

This FEEDLATINA/STDF PROJECT aims to contribute to the harmonization of the regulatory framework for the production and commercialization of animal feed in Latin America and the Caribbean, ensuring its safety and access to markets, based on the standards and recommendations of Codex and the OIE. The project will develop joint activities, commitments and strategies to ensure the participation of the public and private sectors, along with international partners. Various project activities could be sustainable through follow-up workshops and capacity building projects involving the public and private sectors, as well as regional and international agencies. Specific instruments/tools to harmonize and strengthen the current regulatory frameworks for animal feed would be developed, based on the regulatory frameworks of some of the participating countries. Technical capacity at the industry and regulatory levels would be enhanced in the region through training on Regulatory Affairs, Good Manufacturing Practices, Risk Assessment, HACCP, and other related topics.

The structure:

Director Committee
Technical Steering Committee
Specific Technical Groups
The Project Coordinator - FEEDLATINA Executive Director
More Informations:
flavia.castro@feedlatina.org

Feedlatina 2012 1000 tonnes/year

Country	Total	Poultry	Broilers	Layers	Others	Breeders	Swine Total	Cattle Total	Dairy
Latin America total	138.917	78.003	57.347	18.737	281	1.639	27.253	22.725	13.126
Argentina	15.351	6.703	4.590	2.112			1.465	5.963	3.347
Bolivia	1.381	1.150	904	177		69	231		
Brazil	63.023	36.300	31.100	5.200			15.100	7.400	4.800
Chile	6.280	2.062	1.240	435	243	145	1.842	367	
Colombia	6.054	4.168	2.470	1.530		167	830	569	
Costa Rica	521	383	241	123		19	138		
Cuba	1.217	367	84	276		6	850		
Ecuador	2.216	1.147	843	227	12	65	534	51	
El Salvador	446	423	260	144		20	22		
Guatemala	1.203	1.042	457	549		35	161		
Honduras	553	521	384	108		29	32		
Mexico	28.439	14.200	8.023	5.726		451	4.386	7.818	4.597
Nicaragua	370	349	269	59		21	21		
Panamá	497	414	329	60		25	82		
Paraguay	455	301	190	100		11	28	111	98
Peru	4.106	3.572	2.602	770		200	312	40	33
Dominican Republic	1.375	1.098	781	257		60	277		
Uruguay	561	345	203	126		16	55	157	65
Venezuela	4.871	3.459	2.375	758	26	300	888	250	186
Country	Total	Beef	Pet Food	Equine	Aquaculture	Fish	Shrimp	Others	Mineral Salt
Latin America total	138.917	8.613	4.576	568	2.879		565	2.913	1.950
Argentina	15.351	2.616	500	8	4			709	
Bolivia	1.381								
Brazil	63.023	2.600	2.260	560	650	575	75	753	1.950
Chile	6.280		412		1.200			398	
Colombia	6.054		345		142				
Costa Rica	521								
Cuba	1.217								
Ecuador	2.216		30		452	132	320	3	
El Salvador	446								
Guatemala	1.203								
Honduras	553								
Mexico	28.439	3.221	840		215			980	
Nicaragua	370								
Panamá	497								
Paraguay	455	13	4					11	
Peru	4.106	7	27		155	25	130		
Dominican Republic	1.375								
Uruguay	561	92						4	
Venezuela	4.871	64	158		61	21	40	55	

source: Feedlatina

SFMCA Stock Feed Manufacturers' Council of Australia Australia

The Stock Feed Manufacturers' Council of Australia (SFMCA) represents feed milling companies that manufacture over 5,500,000 tonnes of feed annually. Feed supply is spread evenly across the major poultry, pig, beef and dairy industries, with additional feed supplied for equine and aquaculture. Australia is favoured with domestic supplies of cereal grains with wheat, barley and sorghum being the main grains in use. The oilseed crushing industry supplies larger volumes of canola and cottonseed meal, with animal proteins being supplied from the rendering industry.

There is a strong focus on exports of beef, lamb and dairy products, the poultry and pork industries are domestic supply focused. Quality assurance accreditation remains a major focus for the SFMCA through its FeedSafe program that operates nationally for feed manufacturers. There are 120 manufacturing sites FeedSafe accredited, with this representing over 90% of feed sold within Australia. Since 2003, FeedSafe accreditation has been mandatory for all SFMCA members. The SFMCA works closely with Federal and State government departments to ensure there is retained a good relationship with respect to feed and food safety and biosecurity issues.

For more information please visit: www.sfmca.com.au

Feed production by all mills

	Total feed use	Total feed production mills
Total	11,521	7,005
Poultry Broilers	2,900	2,700
Poultry Layers	818	650
Pigs	1,466	1,100
Dairy Cattle	2,988	1,710
Beef Cattle	2,705	350
Sheep	204	150
Aquaculture	117	95
Equine	323	250

SFMCA:Total production by all mills (x1000 tonnes)

THE MAJOR ISSUES THAT ARE BEING ADDRESSED BY THE SFMCA ARE:

- » FeedSafe integration with other supply chain QA programs.
- » Changes to the legislation and controls relating to registered veterinary chemical products.
- » Implementation of a government driven carbon tax and its impact on the manufacturing and agriculture sectors.
- » Decline in the production of dedicated feed grains and the need for feed mills to compete for the supply of milling grade wheat and barley.

FEFAC

European Feed Manufacturers' Federation

EU

KEY MARKET DEVELOPMENTS

The compound feed production in the EU 27 in 2011 slightly decreased by 0.3% to 151 million tonnes. Cattle and pig feed have seen their production fall, respectively by -2 and -0.6%. Opposite to that poultry and layer feed increased by 1%, thereby confirming their position of the leading segment of compound feed, slightly ahead of pig feed.

The most important factors which have weighed in on the EU feed demand in 2011 were the still fragile economic situation of the pig sector and the high feed material costs. As regards ruminants, the severe drought in the first months led to a lower forage harvest during the spring cut but this was balanced by the good autumnal weather conditions that favoured grass growth.

Most EU Member countries saw their production fall, sometimes dramatically such as Czech Republic (-14%) or Denmark with -7%. A few countries such as Germany and Poland managed to buck the general market trend with positive growth of around 3%, supported by a surprisingly quick recovery of pig farming activity, mainly due to increasing exports. As a result, Germany's position as leading EU country in terms of total compound feed production before France was strengthened, with Spain scoring third.

FEFAC experts identified the following key drivers for the compound feed market in 2012:

- » On the livestock sector side, the entry into application of the new cages standard for laying hens from 1 January 2012 and the new-group housing requirements for sows which may lead to a

significant reduction in young sows replacement in certain producer regions; the development of the Schmallenberg virus in ruminant populations may also weigh on the demand;

- » On the feed demand side, the high quotations for all feed materials, whether energy sources like cereals or protein sources like soybean meal, due to high Chinese demand and seasonal drought in South America, will further affect the profitability of the livestock industry, in particular the pig farmers;
- » On the supply side, the persisting problems on the trade of maize co-products (DDG's, corn gluten feed) linked to asynchronous approval of not yet authorised GM events, despite the adoption of the technical solution last year.

As a consequence, FEFAC experts foresee a stabilisation in cattle feed production, a slight increase in poultry feed demand (+1%) and a further setback in pig feed production (-0.5%). Overall, compound feed production is expected to remain stable compared to 2011.

KEY REGULATORY & POLICY DEVELOPMENTS

A. Food and feed security

FEFAC strongly welcomed the clear analysis and outline for a targeted action plan on food price volatility and agriculture initially adopted at the G-20 Farm Ministers meeting in June 2011. Holding the turmoil on the financial market in mind, the G-20 reminded the world about the need to invest in agriculture in order to meet the food requirements of a growing

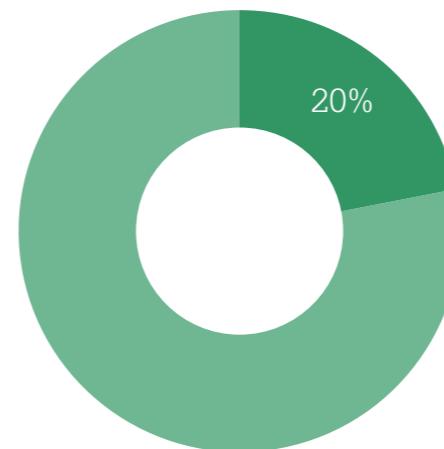
world population. FEFAC encouraged the commitment made by the EU Farm Council and the European Commission to strengthen the EU development cooperation with a pledge of € 8 billion, which should be matched by a serious reflection on how CAP reform proposals may contribute to "raise the game" for EU Agriculture by unlocking its considerable production and productivity potential. FEFAC also welcomed the European Commission's schemes to increase market transparency of agricultural markets by increasing information exchange on EU and global market developments via its Market Reporting System (MARS). This is a key commitment to the new G-20 Global Agricultural Market Information System (AMIS), to be managed by FAO.

FEFAC's Industrial Compound Feed Production Committee therefore agreed to share the market developments on compound feed and feed materials on a quarterly basis with DG Agriculture.

B. CAP Reform

With a view to the policy debate on the CAP reform proposals' goal of improving resource efficiency and competitiveness in European food production, it must be stressed that safe and balanced compound feed from competitive and sustainable sources is an essential prerequisite for the long term viability of EU livestock production. On the specific measures proposed in the CAP reform package, FEFAC proposes to review and support several measures in its preliminary opinion. First of all, direct payments should take scientifically based efficiency criteria into account to provide incentives for the most productive farms. In addition, a rebalancing of direct payments to livestock farmers is necessary to offset

EUROPE'S FEED PRODUCTION AS A PERCENTAGE OF GLOBAL OUTPUT: 20%



Europe's feed production accounts for 20% of global output

Feed production by all mills

	2011	Forecast 2012
Total	151,000	151,000
Poultry Broilers/ Poultry Layers	51,000	51,500
Hog	50,000	49,500
Cattle	39,000	39,000
Aquaculture	1,100	1,100
Pets		

FEFAC: Total feed produced by all mills (x1000 tonnes)

D. Feed Ban

FEFAC is in favour of the reauthorisation of non-ruminant processed animal protein (PAP) as a valuable protein source, under practical conditions, based on the positive opinions of EFSA on the safety of PAP and its positive contribution to improve sustainability of EU livestock production. Therefore, FEFAC members support implementing a step-wise approach by limiting the reauthorisation of non-ruminant processed animal proteins for use in fish feed only. In line with the EU policy objectives for the sustainable development of EU Aquaculture laid down in the Commission proposals for the reform of the Common

Fishery Policy (CFP), EU fish feed producers could use non-ruminant processed animal proteins to replace fishmeal, thus contributing to the preservation of wild fish stocks.

E. Feed Hygiene

FEFAC supports the idea of an integrated feed and food chain policy, placing the responsibility for the safety of the products placed on the market on feed and food business operators. Communication of information on contamination levels throughout the chain is a significant element to optimise monitoring plans at feed company levels. In particular, the most cost-effective way to control chemical contamination in the feed chain is preferably at the "top of the pyramid", i.e. at the level of suppliers of feed materials upstream in the feed chain.

F. Antimicrobial resistance

FEFAC has a longstanding commitment to take actions which could help to reduce the need for antibiotics at farm level. It has contributed to actions and activities at both EU and global level (OIE, WHO and FAO) since 1997. FEFAC is convinced that compound feed manufacturers, as privileged partners and advisers of livestock farmers, have a role to play in promoting good practices for the responsible use of antibiotics. This is why FEFAC is a member of the European Platform for the Responsible Use of Medicines in Animals (EPRUMA), which is a multi-stakeholder platform supported by livestock farmers, veterinarians, the animal health industry and other key partners of the livestock chain and of the pet world. Adequate animal nutrition, meeting both physiological and physical feed structure requirements, is a key prerequisite to maintaining optimal health status of farm animals.

G. Good labelling practices

FEFAC developed a Code of Good Labelling Practice for compound feed destined to food producing animals in cooperation with COPA-COGECA to ensure that the result met the expectations of both the supplier and the customer. This draft code contains recommendations for implementation of mandatory and voluntary labelling, together with label templates and guidance on claims as well as on the provision of additional information on request of the customers, in particular for the percentages of feed materials included in compound feed, having regards to EU legislation on intellectual property.

For more information please visit: www.fefac.eu

FEFANA

EU Association of Specialty Feed Ingredients (SFIs) and their Mixtures

EU

FEFANA is the EU Association of Specialty Feed Ingredients (SFIs) and their Mixtures. FEFANA is a not-for-profit organisation and represents more than 100 companies - a large number of multinational companies, as well as many Small and Medium Enterprises – from 28 countries whether manufacturers, traders and/or importers of feed additives, functional feed ingredients, premixtures, other feed supplements and mixtures of specialty ingredients, produced in the EU or imported from third countries. FEFANA's overall mission is to promote, safeguard and defend the common and general interests of the industry of SFIs and their Mixtures. It represents the views of its Members to the EU authorities and the Competent Authorities of the Member States. All over the years, FEFANA has gained a strong positive reputation across Europe to key decision-makers and it has built close contact with other stakeholders of the feed and food chain. Though being a European organisation, FEFANA has an implicit International responsibility and it is being engaged more and more in projects and platforms at international level. FEFANA is a recognised IFIF full member and the only one as supplier association, playing a significant role in the feed & food chain, sharing a common responsibility with the compound feed industry. We see IFIF as our interface to certain key international organisations, such as Codex and FAO, and as the ideal platform to meet with other actors in the feed chain. Furthermore IFIF is, no doubt, the right place where to run/host FEFANA international projects. In this framework, the years 2012-2013 saw a strong collaboration between IFIF and

FEFANA, which was reflected in the creation of two important projects:

FEFANA-IFIF SFIS PROJECT

The Specialty Feed Ingredients Sustainability (SFIS) project was designed to measure and establish the role of Specialty Feed Ingredients on the environmental impact of livestock production. The project brings together for the first time a consortium of international companies and associations dedicated to reducing the environmental impact of livestock through innovative specialty feed ingredients. The SFIS project aims to contribute to global activities in the area of the environmental effect of livestock production. The results of the projects will be shared with international stakeholders and with feed chain operators in order to encourage more sustainable livestock production globally.

Due to their functionality, Specialty Feed Ingredients are recognised to have not only improvement potential of animal performance, but also to reduce the environmental impact of animal production. By setting up a standard approach to measure this role and delivering a manual of nutritional practice, the project will enable Specialty Feed Ingredients to be included in the evaluation of the mitigation measures to reduce the environmental impact of animal production on a global basis.

FEFANA-IFIF GLOBAL REGULATORY CONVERGENCE PROJECT

This initiative aims at facilitating access to regulation and enforcement practices in different regions of the world, fostering mutual understanding of the regulatory framework applicable to SFIs and their Mixtures. In a globalised world the feed industry feels the need to understand better and to gain access to regulatory and enforcement practices in different regions of the world. IFIF and FEFANA are joining forces in this respect: the global regulatory convergence project aims at comparing the regulatory systems applicable to specialty feed ingredients in various parts of the world to provide regulators with a basis of convergence. This is in order to avoid as much as possible to lose industry and public resources in repetitive evaluation and authorisation processes and ease global trade while reinforcing food and feed safety.

The project is conceived on a stepwise approach that can be applied to groups of countries, allowing working at adapted pace according to the local needs. The first reports are expected to be presented in the course of 2014.

FAMI-QS - BUILDING CONFIDENCE INITIATIVE

FAMI-QS – a Quality System for Specialty Feed Ingredients and their Mixtures – is the only certifiable code specifically aimed at specialty feed ingredients and their mixtures. FAMI-QS certification is based on the community guide to good practices approved by European Commission and its code was designed to be

internationally implemented. FAMI-QS was created by the industry for the industry, and it has now grown to become a reference at global level, highly regarded within the sector and by control authorities. Today FAMI-QS facilitates the global trade of Specialty Feed Ingredients and their Mixtures. The FAMI-QS Secretariat has been carrying out periodical technical training sessions, in the EU, as well as in Third Countries, and providing technical support to the interested parties (Conformity Assessment Bodies - CABs, Feed Business Operators, End Users, Competent Authorities, National Associations etc) via the Building Confidence Initiative launched in 2012 as a holistic approach for maintaining the high value of the FAMI-QS certificate.

FEFANA CELEBRATES 50 YEARS

The first statutes of FEFANA were signed off on the 22nd January 1963 by the National Associations of feed additives manufacturers of Belgium, France, Germany, Italy and the Netherlands. The founding members had the forward vision of forming a European Association to act as an interface between the feed additives manufacturing industry as a whole and the European Union - at that time the European Economic Community (EEC) - and its Member States authorities. Evolution in the European legal framework and market conditions have prompted the alignment of the scope, which currently covers all operators of Specialty Feed Ingredients and their Mixtures. FEFANA has provided added value to its members and supported the growth of the industry by pooling expertise and know-how from experts



throughout Europe and by enabling operators to take the responsibility for the safety of their own products with the support of FAMI-QS, the Quality and Safety System for Specialty Feed Ingredients and their Mixtures. FEFANA is very proud of these achievements and of the on-going commitment of the Specialty Feed Ingredients industry in bringing the safety, quality and societal value of our products into the 21st century. The members of FEFANA have actively started to pave the way and look forward to contributing to overcoming the challenges of tomorrow.

For more information please visit: www.fefana.org.

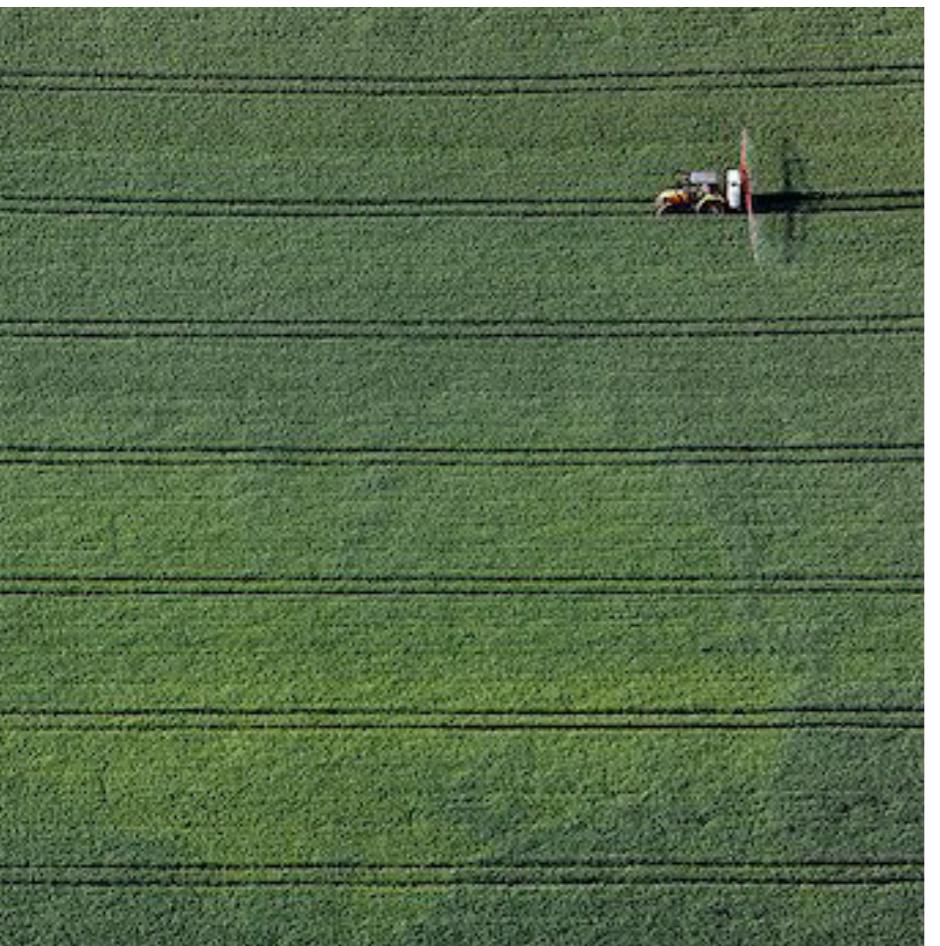
JFMA

Japan Feed Manufacturers Association

Japan

ABOUT JAPAN FEED MANUFACTURERS ASSOCIATION (JFMA)

The Japan Feed Manufacturers Association (JFMA) was established in 1957 as a cooperative to contribute to the prosperity of Japanese feed and livestock industry. Currently, JFMA has 50 member companies and 76 feed mills which produce formula and mixed



feed in Japan. JFMA's total feed production by member companies is approx. 16 million tonnes, which accounts about 65% in Japan.

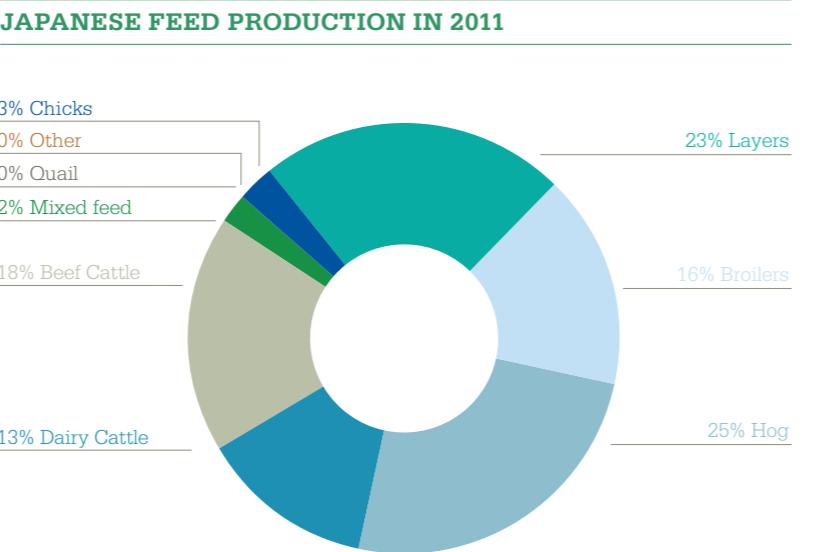
JFMA'S MISSIONS:

- » Represent the feed industry, as a key segment in the food chain
- » Communicate with government officials

OVERVIEW OF JAPANESE LIVESTOCK MARKET

Japan relies on imports for most feed grains e.g. corn, sorghum, barley, wheat, (1,350 thousand tonnes per year), most of which are imported from the United States and Australia. Japan used to import 90% of its corn (which accounts for about 40% of formula and mixed feed), from the United States. Now, however, due to the soaring international prices of corn, it imports from a range of countries, including Ukraine, Brazil, and Argentina. As an alternative solution, wheat has been partially replaced with corn and sorghum. Because of the rising prices of feed grains and the effects of currency exchanges (yen depreciation), Japanese livestock producers have been suffering. Due to the decrease in the number of livestock heads and wings, production of formula and mixed feed have been gradually declining but still remain at around 24 million tonnes. Japanese total formula and mixed feed production in 2011 was 24.176 million (a fall of 1.2% on the previous year). This was largely due to the decline in the number of farms in Japan. The number of dairy farms, for example, fell 4% to 21,000, but, interestingly, did not lead

- » Proposal of policies which would be beneficial for the industry
- » Introduction of networking opportunities for the members
- » Coordination of research projects
- » Organize conferences and forums to enhance discussions and dialogues among the members
- » Improve the code of practices to get customers and consumers confidence



to a significant drop in the number of heads of dairy cows, which remained more or less the same (1,467,000). The number of beef cattle farms fell 6% to 69,600 (while the number of heads was unchanged at 2,723,000). Pig farms numbered 6,000 – a figure that has fallen sharply in recent years but now shows signs of stabilising. The number of pigs actually remained the same at 9,768,000. The number of poultry fell between 2% and 6% in 2011, continuing an established trend for this number to fall.

THE JFMA'S CODE OF PRACTICE FOR SAFE FEED

JFMA established 'JFMA's Code of Practice' in October 2012. The practice aims to improve the mechanisms for assuring feed safety by incorporating the substance of ISO and HACCP mechanisms into the current four guidelines stipulated by the Ministry of Agriculture, Forestry and Fisheries (MAFF).

Japan's four guidelines:

1. Guidelines on Salmonella Countermeasures in Feed Manufacture
2. Guidelines for Prevention of Intermixing of Animal Origin Protein in Ruminant Feeds
3. Enactment of Guidelines on Manufacturing Control and Quality Control for Formula Feed and Feed Additive Formulations Containing Antibiotic Feed Additives
4. Enactment of Guidelines on the Prevention of Contamination of Feed and Other Materials with Toxic Substances

Some of the production plants of the

Production of Compound and Mixed Feed in Japan

Feed Type	-	-	-	(Apr - Nov)
Total	24,803	24,478	24,176	15,901
Chicks	734	727	714	460
Layers	5,636	5,615	5,567	3,596
Broilers	3,975	3,955	3,889	2,564
Hog	6,232	6,041	6,018	3,963
Dairy Cattle	3,135	3,133	3,120	2,051
Beef Cattle	4,582	4,496	4,452	2,965
Quail	34	37	34	23
Others	20	19	20	16
Mixed feed	455	455	362	263

Source: *Japanese total feed (compound and mixed feed) production by all mills (x 1,000 tonnes in fiscal year)

member companies have already started producing formula and mixed feed, conforming to the guidelines, and other association member companies are in a preparatory stage to merge with them e.g. ISO, HACCP and in-house manual. JAFMA hopes Japanese consumers would recognise the feed used for livestock products are produced in safe and conforms to the international feed manufacturing practices.

AFTER THE ACCIDENT AT THE FUKUSHIMA DAI-ICHI NUCLEAR POWER STATION

In 2012, tests were conducted to the agricultural/livestock/aquatic products to check the concentration levels of radioactive cesium, from which results showed a sharp drop in level. The products which exceeded the provisional maximum residue limits (MRLs) of radioactive substances in foods were very limited. Based on the test results, 'the concept for the inspection plan' which was initially scheduled to implement by MAFF in April 2013 has been revised. Furthermore, the inspection plan to be conducted by the local government is also under review. This is the first time since the nuclear accident that there has been significant revision of the priority inspection. Fruits, such as peaches, apples, and pears and fish, such as sand lance, sardines, mackerels, and yellowtails are excluded from the survey and vegetables such as lettuce and spinach, cabbage, radish, and potatoes are also excluded. The number of food items for tests will be reduced from 132 to 98. In terms of formula and mixed feed, the monitoring has been carried out

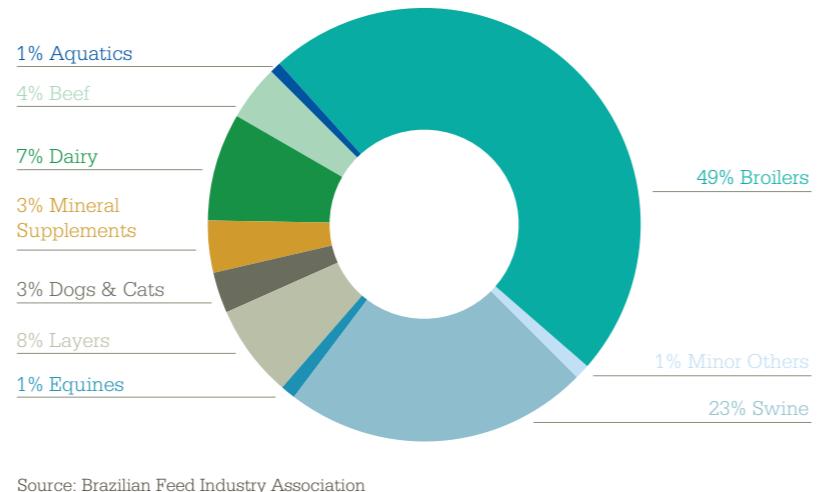
to the feed ingredients. However, as most of the feed ingredients are imported, monitoring of radioactive substances for formula and mixed feed will be suspended after April 2013.

JFMA'S FILING SYSTEM

JFMA has requested that manufacturers of raw materials for feed establish self-voluntarily 'Standard Operating Procedure (SOP)' in compliance with the 'Enactment of Guidelines on the Prevention of Contamination of Feed and Other Materials with Toxic Substances', and report to JFMA on the management status of raw materials in feed. It is recommended that the report is digitised and stored on the filing system of JFMA which can be viewed by member companies and also be reviewed in appropriate period. The member companies of JFMA are planning to ensure the safety of formula and mixed feed in the production based on the practice and ensures to use the feed ingredients which are controlled under supervision of good practice. In the future, we are planning to introduce an improved filing system to cope with the increasing number of reports as well as management conditions on feed ingredients used by all members of the association.

For more information please visit: www.jafma.or.jp

Sindirações Brazilian Feed Industry Association Brazil



The production of the feed industry dropped 3% in 2012, i.e., from January to December, demand reached 63 million MT of complete feed plus 1.95 million MT of mineral supplements, as well as a feedstuff turnover of US\$25 billion. In 2011 this feed industry had manufactured 64.5 million MT of complete feed and 2.35 million MT of mineral supplements, a growth rate of 5.2% compared to 2010.

The industry engaged the reverse gear in the first quarter of 2012 and that trend intensified because of the coexistence of three factors: high cost of soybean meal and corn, low prices paid to livestock producers and slowdown on poultry and beef exports. The lack of capital of many independent producers reduced the herd of swine throughout the year, besides the decrease of breeders and chicks housing, and poultry slaughter rate that lost breath along months. The broiler and swine industries together require more than 70% of the feed produced in Brazil, which is composed by almost 90% of the mixture of maize (40% price up in the first 20 days of July as a result of the drought in the American corn belt) and soybean meal (more than doubled the price along the year due to a severe drought in Argentina and Brazil, as well).

Facing the emergence of the new Brazilian middle class and its consumer potential, the recovery of US jobs, redirection of investments to the domestic market in China and depositing much optimism in the interruption of economic chaos in the European Union, it is acceptable that next year the Brazilian feed industry will be able to offset the loss accumulated in 2012. Taking into consideration the potential of domestic and international demand for animal protein, the projections for

2020 show a production of approximately 40 million MT of feed for broilers, 6 million MT for laying hens, 19 million MT for swine, 3 million MT for beef cattle, 7 million MT for dairy cattle, more than 1 million MT for fish and shrimp, almost 3.5 million MT for dogs and cats and finally 2 million MT for goats, sheep, horses, etc., adding up 81.5 million MT (2.54% CAGR since 2011).

In the case of mineral supplements, the average growth of 8.1% may result in the production of nearly 5 million MT. The expected improvement (CAGR from 2011 until 2020) in the demand for feed is 2.4% for broilers, 2.7% for layers, 2.1% swine, 2.3% for beef cattle, 3% for dairy, 12.3% for fish and shrimp, 4.9% for dogs and cats and 2.0% for sheep, goats, horses, etc... The domestic feed industry has struggled to lessen the current challenges and greatly contributed to the sustainability of the Brazilian animal protein production chain. The private sector work towards success, however, continues, modulated by public authorities initiatives with a complex and heavy tax burden, lack of funding for working capital, grain storage incapacity and weak logistics infrastructure, extreme dependence of additives supplies from overseas, limited use of technology and lots of bureaucracy in the implementation of innovation, among others.

LAYER FEED
The production of feed for laying hens reached 5.2 million MT, due to the housing estimates over 85 million pullets and the overall of 120 million laying hens. While egg production fell 1.5%, the average wholesale price grew 25% and unlike established in 2011, revenue from eggs exports increased over 65%.

BEEF CATTLE FEED

The industry for beef cattle feed produced 2.6 million MT, with reductions of nearly 5% over the previous year, while the feedlot rate followed a downward bias once farmers chose for a single cycle or an incomplete feed lot system, probably because atypical rains favored winter pastures and contributed to anticipate termination of cattle in feedlots. The

ARIOVALDO ZANI
CEO - Brazilian Feed
Industry Association

high cost of feeding concentrates compromised fattening and limited finished cattle offerings, although the generous supply of cows and heifers triggered some overvaluation.

DAIRY FEED

This sector retracted 5.1% and it produced no more than 4.8 million MT of feed in 2012, result of the tendency of reduced investment on dairy activity in an attempt to improve its gross margin because of high cost of feeding concentrates and the low prices paid for milk along the year. The limitation in the milk supply was also intensified because of the drought that hit the Southeast and Midwest and the final harvest in the South Brazilian region.

SWINE FEED

Revenues from pork exports increased by 4.2% as well as 12.6% the amount shipped, despite the barriers imposed

Feed production (YTD September 2012)

segment million MT	2011	2012	% 2012/2011
Total	66,9	64,9	-3,0
Poultry	37,2	36,3	-2,4
Broiler	32,2	31,1	-3,6
Layer	5,0	5,2	5,4
Swine	15,4	15,1	-2,2
Cattle	7,8	7,4	-5,1
Dairy	5,1	4,8	-5,1
Beef	2,7	2,6	-5,1
Dogs & Cats	2,17	2,26	4,0
Equine	0,59	0,56	-4,2
Aquaculture	0,57	0,65	14,0
Fish	0,50	0,56	15,0
Shrimp	0,07	0,08	7,1
Others	0,80	0,75	-5,9
Total Feed	64,5	63,0	-2,3
Mineral Supplements	2,35	1,95	-17,0

Source: Brazilian Feed Industry Association

power has allowed to exercise the responsible ownership by offering industrialized pet food, visiting the vet and enjoying specialized services, such aesthetic and accessories.

AQUACULTURE FEED

Demand for fish feed in 2012 reached 575 thousand MT as well as a 15% growth rate, which has been characterized, year on year, by a continuous growth. Shrimp production in turn, could be more productive, but remained dormant because of lack of appropriate investment that responds to the threat of environmental regulations, the scarcity of public policies and instruments aimed at encouraging its development. In response, the consumption of shrimp feed reached 75,000 MT, an increase of 7.1%.

For more information please visit: www.sindiracoes.org.br

NZFMA New Zealand Feed Manufacturers' Association New Zealand

The major regulatory issue for the New Zealand Feed Manufacturers Association (NZFMA) in the current year is a wide ranging review of animal feed being undertaken by the Ministry for Primary Industries. The Ministry is an amalgamation of the former Ministry of Agriculture and Fisheries and the New Zealand Food Safety Authority. Therefore, it oversees regulations relating to mill operation and also agricultural compounds and veterinary medicines. The review is a complete overview of all animal feed suppliers, manufacturers and retailers. It will include pet food manufacturers, blenders, grain suppliers, animal health distributors as well as feed manufacturers.

The NZFMA members have established a good reputation for their compliance with regulations and a proactive approach to addressing risks for industry. The NZFMA has hosted visits from MPI regulators who will be undertaking the review to ensure that they fully understand all the issues within the feed manufacturing industry.

The NZFMA Code of Manufacturing Practice review has been completed and endorsed by member companies and regulators as a quality, comprehensive document. The IFIF code was a useful resource document during the development process.

The NZFMA is now working with a national audit body to develop an industry accreditation scheme.

Feed mills will be audited as to their compliance with the requirements of the NZFMA Code of Manufacturing Practice audit program is currently in development and the program will be launched in November. It will be a useful scheme both as a proof of compliance for regulators but also as a marketing tool for customers.

Feed production by all mills

	2009	2010	2011	2012
Total	779,881	853,111	921,890	953,135
Maize/Corn	119,550	95,275	61,204	58,794
Wheat	166,958	271,336	359,131	340,746
Barley	96,168	114,631	114,282	93,290
Oats	380	632	552	1,090
Soybean Meal	94,520	101,911	100,707	111,993
Fish Meal	4,398	4,511	4,432	2,655
Meat / Meat & Bone Meal	46,955	47,778	47,231	38,753
Fats and Oils	8,645	12,531	9,693	9,377

Source NZFMA

Industry training has been identified by the NZFMA Board as a major focus. A substantial percentage of industry funding has been targeted for the revision of training qualifications and to support trainee costs. The first course under the revised qualifications that has commenced and feedback has been excellent. An industry trainee of the year award has been established.

For more information please visit: www.nzfma.org.nz

Other Regional Statistics

Selected African Countries Feed Production 2011

estimates per annum (tonnes)

country	Poultry	Ruminants	Pigs	Pets	Other	Total	%
Total	3.678.000	473.000	84.000	6.000	964.000	5.205.000	100%
Nigeria	1.910.000	0			750.000	2.660.000	51,1%
Ghana	200.000	0				200.000	3,8%
Zambia	230.000	55.000	35.000	3.000	10.000	333.000	6,4%
Malawi	100.000	10.000				110.000	2,1%
Mozambique	205.000	0				205.000	3,9%
DRC	35.000	0	5.000			40.000	0,8%
Mauritius	130.000	0	10.000	3.000	10.000	153.000	2,9%
Kenya	600.000	400.000	0			1.000.000	19,2%
Swaziland	80.000	8.000	7.000			95.000	1,8%
Namibia	0	0			100.000	100.000	1,9%
Madagascar	0	0			74.000	74.000	1,4%
Lesotho	13.000	0	2.000			15.000	0,3%
Zimbabwe	175.000	0	25.000	20.000		220.000	4,2%

Source: Dr Erhard Briedenhann 2012

2012 Feedproduction Production in China

Total output	Output mil.tonnes	%
	119.40	+6,0
Compound feed	161,40	+8,4
Concentrate feed	23,50	-7,6
Additive premix feed	6,20	+0,5
Pig feed	79,00	+15,7
Egg Poultry	32,00	+0,8
Meat Poultry	51,00	-3,5
Aquatic feed	18,20	+8,0
Ruminant feed	8,00	+3,2
Others	3,20	+1,3

Source: CFIA

2012 Livestock Production in China

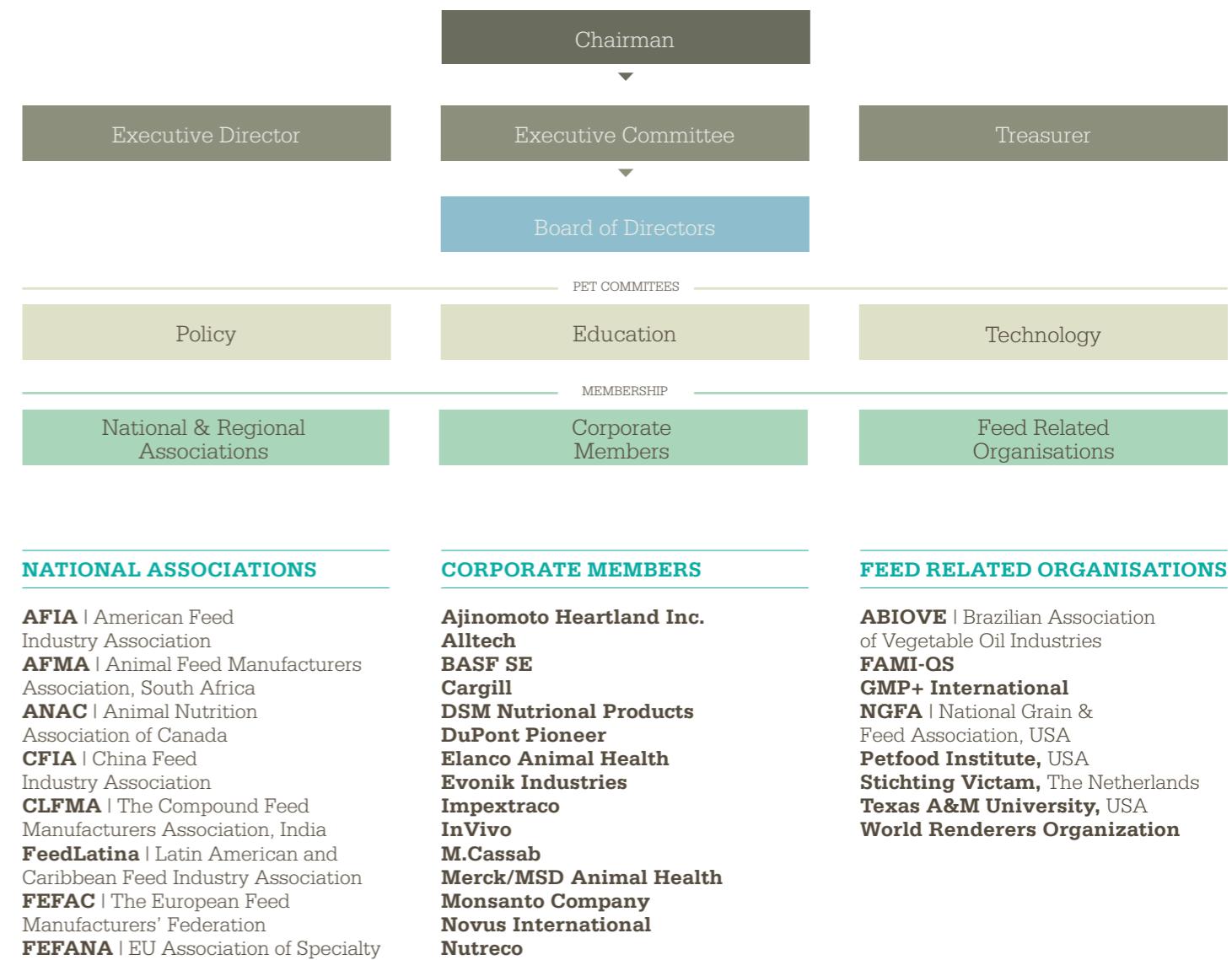
Total of Meat	Output mil.tonnes	%
	82,21	5,4
Among Pork	53,35	5,6
Total of Eggs	28,61	1,8
Total of Milk	37,44	2,3

Source: CFIA



»IFIF represents the global feed industry as an essential participant in the food chain that provides sustainable, safe and nutritious food. IFIF is made up of national feed associations, feed related organisations, and corporate members from around the globe. Overall, IFIF members represent over 80% of the global animal feed industry.«

Structure & Membership



IFIF Directors 2012-2013

IFIF EXECUTIVE DIRECTOR

Alexandra de Athayde
Germany

IFIF EXECUTIVE COMMITTEE 2012/13

Aidan Connolly
Vice President, Alltech
USA

Alexandra de Athayde
Executive Director, International Feed
Industry Federation (IFIF)
Germany

Ariovaldo Zani
CEO, Brazilian Feed Industry
Association (Sindirações)
Brazil

Dave Cieslak
Vice President, Cargill
USA

Federico Etcheverry
President, Latin American Feed
Industry Association (Feedlatina)
Uruguay

Joel Newman
President & CEO, American Feed
Industry Association (AFIA)
USA

Li Xirong
Secretary General, China Feed
Industry Association (CFIA)
China

Mario Sergio Cutait
Chairman, International Feed
Industry Federation (IFIF)
& Director, M.Cassab
Brazil

Patrick Vanden Avenne
President, European Feed
Manufacturers' Federation (FEFAC)

Manufacturers' Federation (FEFAC)
& Treasurer, International Feed
Industry Federation (IFIF)
Belgium

Reinder Sijtsma
Senior Manager, Nutreco
Netherlands

IFIF BOARD MEMBERS 2012/13

Aidan Connolly
Vice President, Alltech
USA

Alexandra de Athayde
Executive Director, International Feed
Industry Federation (IFIF)
Germany

Ariovaldo Zani
CEO, Brazilian Feed Industry
Association (Sindirações)
Brazil

Dave Cieslak
Vice President, Cargill
USA

Federico Etcheverry
President, Latin American Feed
Industry Association (Feedlatina)
Uruguay

Joel Newman
President & CEO, American Feed
Industry Association (AFIA)
USA

Li Xirong
Secretary General, China Feed
Industry Association (CFIA)
China

Mario Sergio Cutait
Chairman, International Feed
Industry Federation (IFIF)
& Director, M.Cassab
Brazil

Patrick Vanden Avenne
President, European Feed
Manufacturers' Federation (FEFAC)

Joel Newman
President & CEO, American Feed
Industry Association (AFIA)
USA

Li Xirong
Secretary General, China Feed Industry
Association (CFIA)
China

Mario Sergio Cutait
Chairman, International Feed Industry
Federation (IFIF), & Director, M.Cassab
Brazil

Patrick Vanden Avenne
President, European Feed
Manufacturers' Federation (FEFAC)
& Treasurer, International Feed
Industry Federation (IFIF)
Belgium

Reinder Sijtsma
Senior Manager, Nutreco
Netherlands

Scot Williams
Vice President, DSM
Switzerland

Steve Auman
Director, PotashCorp
USA

De Wet Boshoff
Executive Director, Animal
Feed Manufacturers Association
(AFMA) South Africa

Didier Jans

Secretary General, EU Association of
Specialty Feed Ingredients and their
Mixtures (FEFANA)
Belgium

Federico Etcheverry
President, Latin American and
Caribbean Feed Industry Association
(Feedlatina)
Uruguay

IFIF Expert Committees 2012-13

Experts from member companies and national associations participate in IFIF's three expert and technical committees: Policy, Technology and Education (PET). These consider key industry issues and help develop global feed and food industry standards.

POLICY COMMITTEE

In 2013, the Policy Committee continued its work with Codex Alimentarius to ensure that IFIF's position is fairly represented in Codex feed-related work, including input into the Codex Task Force on Animal Feeding draft documents.

The Committee is also working on the second phase of the Comparison of Approvals Process and Risk Assessment Procedures for Feed Ingredients Project. This will eventually lead to the creation of a model for ingredient equivalency between countries and an expansion to other world regions.

Joel Newman (Chair)
American Feed Industry
Association (AFIA), USA

Aidan Connolly
Alltech, USA

Alexander Döring
European Feed Manufacturers'
Federation (FEFAC), Belgium

Angela Pellegrino Missaglia
Brazilian Feed Industry
Association (Sindirações), Brazil

Ariovaldo Zani
Brazilian Feed Industry Association
(Sindirações), Brazil

Daniel Bercovici
Ajinomoto Heartland Inc., USA

Carlos Gonzalez
Novus International, USA

Colm Moran
Alltech, Ireland

De Wet Boshoff
Animal Feed Manufacturers
Association (AFMA), South Africa

Didier Jans
EU Association of Specialty
Feed Ingredients and their
Mixtures (FEFANA), Belgium

Graham Cooper
Animal Nutrition Association
of Canada (ANAC), Canada

Hubert de Roquefeuil
Invivo NSA, France

John Spragg
Stock Feed Manufacturers' Council
of Australia (SFMCA), Australia

Karine Tanan
Cargill, Belgium

Mark Reisinger
DuPont Pioneer, USA

Reinder Sijtsma
Nutreco, Netherlands

Scot Williams
DSM, Switzerland

Zhang Zhenqi
China Feed Industry
Association (CFIA), China

EDUCATION COMMITTEE

The Education Committee works to promote the adoption and use of the IFIF FAO Feed Manual of Good Practices for the Feed Industry. The Committee also organized the IV. Global Feed & Food Congress, which was held for the first time on the African continent on 8-12 April 2013 in Sun City, South Africa.

De Wet Boshoff (Chair)
Animal Feed Manufacturers Association (AFMA), South Africa

Arioaldo Zani
Brazilian Feed Industry Association (Sindirações), Brazil

Bruno Caputi,
Brazilian Feed Industry Association (Sindirações), Brazil

Dave Cieslak
Cargill, USA

Didier Jans
EU Association of Specialty Feed Ingredients and their Mixtures (FEFANA), Belgium

Flavia Ferreira de Castro
Latin American Feed Industry Association (Feedlatina), Uruguay

Marcel Joineau
Latin American and Caribbean Feed Industry Association (Feedlatina), Uruguay

TECHNOLOGY COMMITTEE

The Technology Committee is working on the Specialty Feed Ingredients Sustainability (SFIS) project, which brings together for the first time a consortium of international companies and associations dedicated to reducing the environmental impact of livestock through innovative specialty feed ingredients.

The Committee is also overseeing the work related to the FAO Global Agenda of Action, which will focus on the improvement of resource-use efficiency in the livestock sector to support livelihoods, long-term food security and economic growth while safeguarding other environmental and public health outcomes.

Alexander Döring (Chair)
European Feed Manufacturers' Federation (FEFAC), Belgium

Arioaldo Zani
Brazilian Feed Industry Association (Sindirações), Brazil

Daniel Bercovici
Ajinomoto Heartland Inc., USA

Didier Jans
EU Association of Specialty Feed Ingredients and their Mixtures (FEFANA), Belgium

Federico Etcheverry
Latin American and Caribbean Feed Industry Association (Feedlatina), Uruguay

Flavia Ferreira de Castro
Latin American and Caribbean Feed Industry Association (Feedlatina), Uruguay

Karine Tanan
Cargill, Belgium

Liesl Breytenbach
Animal Feed Manufacturers Association (AFMA), South Africa

Emmanuel Geneiatakis
FAMI-QS, Belgium

Richard Sellers
American Feed Industry Association (AFIA), USA

Reinder Sijtsma
Nutreco, Netherlands

Johan den Hartog
GMP+ International, Netherlands

Credits

Laurent Bellec is a French artist photographer from Brittany who in technical partnership with FEFAC (the European Feed Manufacturers' Federation) captures architectural images of plants in the Animal Feed sector in Europe and in the world.

IFIF is pleased to feature some of Laurent's art in this annual report and we would like to thank him for his contributions.

"From large concrete cathedrals that mark the landscape in their isolation, to small traditional brick mills in the village centre, and to plants whose hybrid architecture reflects the passage of time and the evolution of the profession, Laurent lets us discover the diversity of styles embodied in the real estate of our plants. These photos surprise us with their uncluttered style, their avoidance of visual stereotypes,

their well-chosen camera angles, and lovely contrasts of black and white, colours and multiple nuances. They are proof that efficiency is perfectly compatible with a sense of beauty. It is the great merit of the artist to bring us through this kaleidoscope a message of beauty and history. With this beautiful book, Laurent Bellec's journey across Europe will leave a lasting memory for future generations." Patrick Vanden Avenne, IFIF Treasurer 2012-2013

For more information please visit:
www.art-feedmanufacture.com



Photography by Laurent Bellec©

Definitions & Terms

DEFINITIONS

Feed (Feeding stuff)

Any single or multiple materials, whether processed, semi-processed or raw, which is intended to be fed directly to food-producing animals.

Feed ingredient

A component part or constituent of any combination or mixture making up a feed, whether or not it has a nutritional value in the animal's diet, including feed additives. Ingredients are of plant, animal or aquatic origin, or other organic or inorganic substances.

Feed additive

Any intentionally added ingredient not normally consumed as feed by itself, whether or not it has nutritional value, which affects the characteristics of feed or animal products. Micro-organisms, enzymes, acidity regulators, trace elements, vitamins and other products fall within the scope of this definition depending on the purpose of use and method of administration.

Medicated feed

Any feed which contains veterinary drugs as defined in the Codex Alimentarius Commission Procedural Manual.

TERMS

Complete feed

A nutritionally adequate feed compounded by a specific formula to be fed as the sole ration and capable of maintaining life and/or promoting production without any additional substance except water.

Concentrate

A feed used with another to improve the nutritive balance of the total and intended to be diluted or mixed to produce a supplement or a complete feed; may be unsafe if fed free choice or alone as a supplement.

Micro-ingredients

Vitamins, minerals, antibiotics, drugs/medicines, and other materials usually required in feeds in small amounts as feed additives.

Premix

A uniform mixture of one or more microingredients/ additives with a diluent and/ or carrier to facilitate their even distribution in a larger mix.

Primary feed

A feed formulated from single ingredients, sometimes containing a premix (less than less than 45.5 kg per tonne or 100 pounds per tonne).

Trace Minerals

Mineral nutrients required by animals in micro amounts (measured in units of grams per kg or smaller).

IFIF Members

NATIONAL AND REGIONAL ASSOCIATIONS



CORPORATE MEMBERS



FEED-RELATED ORGANIZATIONS



Postal address:

International Feed
Industry Federation (IFIF)
Freier Weg 6
D-53177 Bonn
Germany
info@ifif.org
www.ifif.org

Registered address:

International Feed
Industry Federation a.s.b.l.
7 rue Alcide de Gasperi
L-1013 Luxembourg
R.C.S. Luxembourg F 4.483

